2021 Global Automotive Consumer Study
Insights for South Africa
To learn more about the Global Automotive Consumer Study, visit www.deloitte.com/autoconsumers
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 affecting 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 prioritise and better position their business strategies and investments.

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

Key insights from our 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.

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.
Executive summary

The impact of the COVID-19 pandemic on automotive consumer behaviour

The COVID-19 pandemic has had a major impact on consumer behaviour in the automotive industry. It has affected the choice of vehicles; made consumers more price-conscious and made young consumers reconsider their attitudes towards vehicle ownership.

The key findings are:

1. Consumers reconsider their vehicle choices and purchasing plans

   As a likely result of the adverse economic environment due to the ongoing COVID-19 pandemic, 40% of consumers stated that they are considering delaying the purchase of the next vehicle. However, only 16% of consumers consider purchasing a cheaper, more fuel-efficient or smaller vehicle due to the impact of the pandemic. While young consumers tend to regard vehicle ownership as less important than older consumers do, pandemic-induced social distancing is an important factor pushing younger consumers to think about vehicle ownership.

2. Consumers seek affordability and convenience when choosing a vehicle finance provider

   While a quarter of South African consumers said, they did not research vehicle-financing options, 45% spent more than 3 hours researching finance options prior to acquiring their current vehicle. More than half of consumers stated that receiving the lowest possible financing rate was the key factor when choosing a vehicle finance provider. In addition to consideration related to affordability, South African consumers look for a provider that offers convenience, an easy process and flexibility. These key factors suggest that South African consumers are price-conscious and many feel the economic impact of the COVID-19 pandemic.

3. Dealerships remain the preferred purchasing channel

   Dealerships remain the preferred purchasing channel among South African consumers. Close to three-quarters stated that they intend to purchase their next vehicle in person at a dealership. Most consumers said they wanted to see and/or test drive a vehicle prior to purchasing it. Close to half the consumers that are open to purchase their next vehicle through a virtual process stated convenience as the key driver for them to use a virtual channel.

4. Cost and lack of enabling infrastructure remain key barriers to electric vehicle (EV) adoption

   Interest in vehicles with alternative powertrains has dropped in South Africa compared to last year’s survey. Higher prices relative to vehicles with internal combustion engines and the lack of enabling infrastructure remain key barriers to EV adoptions in the country. The majority of consumers that consider an EV as their next vehicle would be willing to pay up to R500,000 for such a vehicle.
The 2021 study includes more than 24,000 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.
Vehicle financing trends
One quarter of current owners said they did not conduct any research on financing options prior to acquiring their vehicle, while another 32% of people said they spent more than 5 hours on research.

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

- **13%** spent less than 1 hour.
- **18%** spent 1 hour to less than 3 hours.
- **13%** spent 3 hours to less than 5 hours.
- **32%** spent 5 hours or more.
- **24%** did not research finance options.

**Q13:** In total, how long did you spend researching finance options prior to acquiring your current vehicle?  
Sample size: n=725

Top three factors for financing are: receiving the lowest finance rate, convenience and an easy-to-use payment process.

**Most important things related to loan/lease/subscription account**

- Receiving lowest possible rate for my credit rating: 56%
- Convenience: 45%
- Easy process to pay or set up auto-pay: 43%
- Flexibility (e.g., early termination, vehicle swap): 42%
- Choosing a recognizable name and trusted, established auto lender: 41%
- Access to loan payoff and equity status: 33%
- Simple/easy website/mobile app to manage account: 29%
- All-in rates: 29%
- Receiving customized vehicle offers for accessories, services, etc.: 27%
- Quick to speak with a live agent on the phone: 26%
- Ability to text or message your auto lender: 14%

**Q14:** When it comes to your loan/lease/subscription account, what is most important to you? Please select all that apply.  
Sample size: n=725
Consumers, across age groups, prefer the lowest loan rate coupled with convenience and an easy payment process.

**Most important things related to loan/lease/subscription account by age group**

<table>
<thead>
<tr>
<th>Q14: When it comes to your loan/lease/subscription account, what is most important to you? Please select all that apply.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sample size: n=171 [18-34]; 293 [35-54]; 261 [55 or older]</td>
</tr>
</tbody>
</table>

While mobile interaction is the preference of younger consumers, older consumers prefer liaising with a person.

**Most preferred way of interacting with auto lender by age group**

<table>
<thead>
<tr>
<th>Q15. What is your preferred way of interacting with your auto lender? Sample size: n=171 [18-34]; 293 [35-54]; 261 [55 or older]</th>
</tr>
</thead>
</table>

**Note:** Sum of preferred ways of interacting with auto lender does not add up to 100% as N/A % was not shown.
Younger consumers prefer completing a finance application via paper or their mobile device while older consumers prefer their personal computer.

Most preferred way to complete a vehicle financing application by age group

Note: Sum of %s for 18-34 and 35-54 does not add to 100% due to rounding

Q38. How would you most prefer to complete a vehicle financing application?
Sample size: n= 284 [18-34]; 309 [35-54]; 248 [55 or older]

Overall, two thirds of consumers are somewhat/very likely to purchase credit protection as part of a new loan/lease agreement.

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

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

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?
Sample size: n= 750 [Overall]; 251 [18-34]; 287 [35-54]; 212 [55 or older]

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 pays off or reduces your amount owed in the case of disability, death, job loss, etc.)?
Surprisingly, younger consumers are willing to wait longer to receive a decision about a vehicle financing application.

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

Sample size: n= 284 [18-34]; 309 [35-54]; 248 [55 or older]

Overall, 36% of consumers are comfortable with completing vehicle finance transactions via live video chat on their mobile device while more than half of older consumers are not at all/not very comfortable.

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

Sample size: n= 841 [Overall]; 284 [18-34]; 309 [35-54]; 248 [55 or older]
Approval wait time, lack of transparency, and completing paper-based forms are the most disliked aspects of the financing process.

**Most disliked part(s) of the finance process**

- Waiting for approval: 46%
- Lack of transparency in the process: 43%
- Completing paper-based forms: 40%
- Lack of control of the process: 34%
- Understanding finance terms and language: 32%
- "Hard pull" of your credit report: 24%
- Disclosing personal information: 24%
- Completing online forms: 19%
- Other: 1%

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

Sample size: n= 841

Finally, one quarter 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**

- Overall: 17%
- 18-34: 24%
- 35-54: 21%
- 55 or older: 7%

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

**Q16:** Have you requested a payment deferment this year?

Sample size: n= 725 [Overall]; 171 [18-34]; 293 [35-54]; 261 [55 or older]
Future vehicle intentions
Half of the consumers have altered their timeline for acquiring their next vehicle, with the majority of them thinking of delaying their purchase.

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

- Yes, I intend to acquire my next vehicle sooner than I originally planned: 47%
- Yes, I intend to acquire my next vehicle later than I originally planned: 11%
- No, I haven't altered my timeline for acquiring my next vehicle: 42%

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

- No/very little influence: 47%
- Some/significant influence: 47%
- No stimulus program available: 6%

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

- Somewhat/very likely: 51%
- Neutral: 20%
- Not at all/not very likely: 28%

**Note:** Sum of %s does not add to 100% due to rounding.

**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= 921 [Q23]; n= 100 [Q24]; n= 369 [Q25]
Only 16% of consumers are thinking about a different kind of vehicle as a result of the pandemic – half of these people want to spend less money.

COVID-19 pandemic caused you to change your mind regarding what type of vehicle you would most like to acquire next

Kind of vehicle consumers are planning to buy now because of changing their minds due to the COVID-19 pandemic

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= 921 [Q30]; n= 151 [Q31]

Pandemic-induced social distancing is an important factor pushing young 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 by age group

Q28. Are you planning to acquire your next vehicle primarily due to the need of maintaining social distance while traveling? Sample size: n= 921 [overall]; 319 [18-34]; 339 [35-54]; 263 [55 or older]
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 by age group**

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Overall</th>
<th>18-34</th>
<th>35-54</th>
<th>55 or older</th>
</tr>
</thead>
<tbody>
<tr>
<td>Partially virtual process (i.e., online shopping, physical test drive, digital document signing)</td>
<td>18%</td>
<td>10%</td>
<td>4%</td>
<td>16%</td>
</tr>
<tr>
<td>Fully virtual process (i.e., online shopping, digital document signing, vehicle drop-off)</td>
<td>14%</td>
<td>11%</td>
<td>13%</td>
<td>4%</td>
</tr>
<tr>
<td>In-person (i.e., face-to-face at the dealership)</td>
<td>73%</td>
<td>75%</td>
<td>64%</td>
<td>80%</td>
</tr>
</tbody>
</table>

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

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

Sample size: n= 895 [Overall]; 303 [18-34]; 331 [35-54]; 261 [55 or older]

Even if people are looking for a virtual sales experience, most of them would still prefer to acquire their next vehicle from a dealer.

**Most preferred way to acquire next vehicle via a virtual process**

<table>
<thead>
<tr>
<th>Source of Vehicle</th>
<th>Overall</th>
<th>18-34</th>
<th>35-54</th>
<th>55 or older</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manufacturer</td>
<td>61%</td>
<td>47%</td>
<td>31%</td>
<td>65%</td>
</tr>
<tr>
<td>Authorized dealer</td>
<td>33%</td>
<td>6%</td>
<td>5%</td>
<td>4%</td>
</tr>
<tr>
<td>Third party retailer</td>
<td>6%</td>
<td>5%</td>
<td>4%</td>
<td>0%</td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
<td>1%</td>
<td>0%</td>
<td>6%</td>
</tr>
</tbody>
</table>

**Note:** Sum of %s for Overall does 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= 246 [Overall]; 75 [18-34]; 118 [35-54]; 53 [55 or older]
Convenience is the main reason for consumers to consider a virtual process for acquiring their next vehicle.

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

- Convenience: 46%
- Speed of transaction: 17%
- Necessity (i.e., health concerns about physical interactions): 16%
- General desire to avoid going to a dealer: 10%
- Other: 0%

**Note:** Sum of %s for 18-34 and 35-54 does 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= 246

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

**Main reasons for being uninterested in acquiring next vehicle via virtual process**

- I have to see the vehicle before I buy it: 80%
- I have to test drive vehicle before I buy it: 71%
- I don't feel comfortable making such a big purchase online: 56%
- I want to have my questions answered by a real person: 55%
- I want to have a personal contact in case something goes wrong: 50%
- I prefer to negotiate the price of the vehicle in person: 46%
- I would like to build a relationship with the dealer for service: 35%
- I want to be treated like my business is important: 25%
- Other: 1%

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= 649
And some things never change, as consumers still want a good deal with transparent pricing and a test drive before they commit to buying a vehicle.

**Top three most important aspects of the purchase experience**

<table>
<thead>
<tr>
<th>Aspect</th>
<th>18-34</th>
<th>35-54</th>
<th>55 or older</th>
</tr>
</thead>
<tbody>
<tr>
<td>Getting a good deal</td>
<td>31%</td>
<td>33%</td>
<td>27%</td>
</tr>
<tr>
<td>Physical interaction with the vehicle (i.e. test drive)</td>
<td>40%</td>
<td>52%</td>
<td>41%</td>
</tr>
<tr>
<td>Transparent pricing</td>
<td>13%</td>
<td>9%</td>
<td>13%</td>
</tr>
<tr>
<td>Getting all my questions answered</td>
<td>17%</td>
<td>14%</td>
<td>10%</td>
</tr>
<tr>
<td>To be offered different financing and usage-based models</td>
<td>8%</td>
<td>8%</td>
<td>8%</td>
</tr>
<tr>
<td>Building trust in the salesperson</td>
<td>17%</td>
<td>9%</td>
<td>10%</td>
</tr>
<tr>
<td>Convenient location</td>
<td>15%</td>
<td>12%</td>
<td>10%</td>
</tr>
<tr>
<td>Having a resource for post-purchase needs</td>
<td>14%</td>
<td>13%</td>
<td>10%</td>
</tr>
<tr>
<td>Ability to complete all or some of the process virtually</td>
<td>13%</td>
<td>12%</td>
<td>8%</td>
</tr>
<tr>
<td>Low pressure experience</td>
<td>12%</td>
<td>14%</td>
<td>10%</td>
</tr>
<tr>
<td>Making good use of my time</td>
<td>9%</td>
<td>9%</td>
<td>8%</td>
</tr>
</tbody>
</table>

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= 895

In fact, only 17% 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**

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Not at all likely</th>
<th>Not very likely</th>
<th>Neutral</th>
<th>Somewhat likely</th>
<th>Very likely</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-34</td>
<td>17%</td>
<td>10%</td>
<td>10%</td>
<td>13%</td>
<td>8%</td>
</tr>
<tr>
<td>35-54</td>
<td>17%</td>
<td>13%</td>
<td>10%</td>
<td>10%</td>
<td>3%</td>
</tr>
<tr>
<td>55 or older</td>
<td>10%</td>
<td>10%</td>
<td>10%</td>
<td>10%</td>
<td>3%</td>
</tr>
</tbody>
</table>

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

Q53. How likely are you to acquire your next vehicle without a test drive?
Sample size: n= 895 [Overall]; 257 [18-34]; 293 [35-54]; 329 [55 or older]
What about “virtual servicing”? Consumers are interested, but opinions differ on whether they would pay for it.

Compared to other age groups, young consumers are more interested in subscription services, particularly ones that offer different brands of vehicles or different models within brand.

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

- **different pre-owned vehicles**
  - 18-34: 54%
  - 35-54: 50%
  - 55 or older: 48%
  - Overall: 50%

- **different brand of vehicle**
  - 18-34: 54%
  - 35-54: 50%
  - 55 or older: 50%
  - Overall: 50%

- **different vehicle model from the same brand**
  - 18-34: 42%
  - 35-54: 29%
  - 55 or older: 34%
  - Overall: 34%

**Q59.** How interested are you in each of the following scenarios?
Sample size: n= 1,051 [Overall]; 335 [18-34]; 365 [35-54]; 351 [55 or older]

---

**Note:** Sum of %s for 55 or older does not add to 100% due to rounding

**Note:** Sum of %s for Overall and 18-34 does not add to 100% due to rounding

---

**Q20:** To what extent are you interested in the following services?
Sample size: n= 433 [Overall]; 113 [18-34]; 180 [35-54]; 140 [55 or older]
But, consumers are reluctant to pay more for a subscription with nearly 40% of people saying they either expect to pay less or not pay more.

**Percentage of consumers who are willing to pay for a**

- **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 does not add to 100% due to rounding

**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= 786

**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= 747

**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?)

Sample size: n= 705

Finally, consumer trust is split between the brand of vehicle they own and either the selling or servicing dealer.

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

Sample size: n= 807 [Overall]; 182 [18-34]; 324 [35-54]; 301 [55 or older]
Technology in focus: vehicle electrification
Interest in ICE engines is edging back up, to some extent, due to consumers' financial concerns caused by the COVID-19 pandemic.

**Type of engine in next vehicle**

<table>
<thead>
<tr>
<th>Engine Type</th>
<th>2021</th>
<th>2020</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gasoline/Diesel (ICE)</td>
<td>77%</td>
<td>62%</td>
<td>77%</td>
</tr>
<tr>
<td>Hybrid electric (HEV)</td>
<td>15%</td>
<td>13%</td>
<td>24%</td>
</tr>
<tr>
<td>All battery-powered electric (BEV)</td>
<td>5%</td>
<td>10%</td>
<td>6%</td>
</tr>
<tr>
<td>Other</td>
<td>3%</td>
<td>4%</td>
<td>4%</td>
</tr>
</tbody>
</table>

**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= 895 [2021]; 1,163 [2020]; 1,215 [2019]

For the people intending to buy an EV, it's mostly about lowering fuel costs, reducing emissions, and less maintenance.

**Type of engine in your next vehicle**

- Petrol/Diesel (ICE): 77%
- Hybrid electric/All battery-powered: 20%
- Other: 3%

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

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

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

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= 176
Since 2018, concerns regarding the lack of charging infrastructure have increased while issues regarding the cost and range have declined somewhat.

### Greatest concern regarding all battery-powered electric vehicles

<table>
<thead>
<tr>
<th>Concern</th>
<th>2021</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lack of electric vehicle charging infrastructure</td>
<td>37%</td>
<td>31%</td>
</tr>
<tr>
<td>Cost/price premium</td>
<td>16%</td>
<td>19%</td>
</tr>
<tr>
<td>Driving range</td>
<td>15%</td>
<td>17%</td>
</tr>
<tr>
<td>Time required to charge</td>
<td>14%</td>
<td>13%</td>
</tr>
<tr>
<td>Safety concerns with battery technology</td>
<td>10%</td>
<td>14%</td>
</tr>
<tr>
<td>Lack of choice</td>
<td>3%</td>
<td>1%</td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
<td>10%</td>
</tr>
</tbody>
</table>

**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= 895 [2021]; 1,192 [2018]

More than half of EV intenders (61%) are looking to buy in the sub-R500 000 range, suggesting a price threshold for electric vehicles.

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

<table>
<thead>
<tr>
<th>Price Range</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than 300,000 rand</td>
<td>30%</td>
</tr>
<tr>
<td>300,000 rand to less than 500,000 rand</td>
<td>31%</td>
</tr>
<tr>
<td>500,000 rand to less than 750,000 rand</td>
<td>19%</td>
</tr>
<tr>
<td>750,000 rand to less than 1 million rand</td>
<td>12%</td>
</tr>
<tr>
<td>1 million rand to less than 1.5 million rand</td>
<td>3%</td>
</tr>
<tr>
<td>1.5 million rand or more</td>
<td>1%</td>
</tr>
<tr>
<td>Don't know/not sure</td>
<td>4%</td>
</tr>
</tbody>
</table>

**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= 176
Most intended EV buyers expect to charge their EVs at home while only 14% of them will be using public charging stations despite the persistent, overall concern regarding the availability of a viable charging network.

**Expecting to charge electrified vehicle most often at...**

![Chart showing charging preferences: Home 73%, Work (via employer-provided charge station) 12%, On-street/public charge station 14%, Other 2%]

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

**Q45. Where do you expect to charge your electrified vehicle most often?**
Sample size: n= 185

Nearly half (44%) of the respondents are unwilling to pay anything above 8 000 rand for an alternative engine, raising questions around demand potential.

**Willingness to pay for technologies**

<table>
<thead>
<tr>
<th>Technology</th>
<th>I wouldn't pay more</th>
<th>Up to 8,000 rand</th>
<th>8,000 rand to 40,000 rand</th>
<th>More than 40,000 rand</th>
</tr>
</thead>
<tbody>
<tr>
<td>Infotainment technologies</td>
<td>11%</td>
<td>24%</td>
<td>17%</td>
<td>24%</td>
</tr>
<tr>
<td>Autonomous technologies</td>
<td>21%</td>
<td>28%</td>
<td>27%</td>
<td>26%</td>
</tr>
<tr>
<td>Connected technologies</td>
<td>42%</td>
<td>27%</td>
<td>41%</td>
<td>41%</td>
</tr>
<tr>
<td>Alternative engine technologies</td>
<td>26%</td>
<td>21%</td>
<td>15%</td>
<td>14%</td>
</tr>
<tr>
<td>Safety technologies</td>
<td>21%</td>
<td>15%</td>
<td>15%</td>
<td>14%</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=983
As for other CASE technologies, nearly 4 in 10 consumers believe AVs will not be safe and 70% are concerned about connected vehicle security.

**Percentage of consumers who agree that ...**

<table>
<thead>
<tr>
<th>Statement</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>With connected vehicles, I fear someone hacking into my car and risk my personal safety</td>
<td>70%</td>
</tr>
<tr>
<td>As vehicles become more connected via wireless internet, they are more beneficial for me</td>
<td>56%</td>
</tr>
<tr>
<td>Fully self-driving cars will not be safe</td>
<td>37%</td>
</tr>
</tbody>
</table>

**Q3:** To what extent do you agree or disagree with the following statements?  
Sample size: n=1 019

But, safety technologies are top of mind as blind spot warning and emergency braking are among the most desired vehicle features.

**Importance (Somewhat/very important) of various vehicle features for next vehicle purchases**

<table>
<thead>
<tr>
<th>Feature</th>
<th>Importance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blind spot warning/alert</td>
<td>89%</td>
</tr>
<tr>
<td>Built-in navigation system</td>
<td>84%</td>
</tr>
<tr>
<td>Automatic emergency braking</td>
<td>84%</td>
</tr>
<tr>
<td>Lane departure warning</td>
<td>73%</td>
</tr>
<tr>
<td>360-degree camera system</td>
<td>72%</td>
</tr>
<tr>
<td>Electronic parking assist</td>
<td>72%</td>
</tr>
<tr>
<td>Adaptive cruise control</td>
<td>68%</td>
</tr>
<tr>
<td>Built-in WiFi hotspot</td>
<td>62%</td>
</tr>
<tr>
<td>Physical knobs/buttons for controls (e.g., radio, heater)</td>
<td>62%</td>
</tr>
<tr>
<td>Automatic/dual zone climate control</td>
<td>60%</td>
</tr>
<tr>
<td>Over-the-air software updates</td>
<td>51%</td>
</tr>
<tr>
<td>Apple CarPlay / Android Auto interface</td>
<td>49%</td>
</tr>
<tr>
<td>Heated/cooled seats</td>
<td>48%</td>
</tr>
<tr>
<td>Semi-autonomous drive mode (e.g., Autopilot)</td>
<td>46%</td>
</tr>
</tbody>
</table>

**Q26.** How important are each of the following features for your next vehicle?  
Sample size: n= 921
Contacts

Martyn Davies
Automotive Leader, South Africa
Deloitte South Africa
mdavies@deloitte.com

Ryan Robinson
Automotive Research Leader
Deloitte LLP
ryanrobinson@deloitte.ca

Mike Vincent
Director: Consulting
Strategy & Business Design
Deloitte South Africa
mivincent@deloitte.co.za

Joseph Zitha
Partner: FA Mergers and Acquisitions
jzitha@deloitte.co.za

Mark Victor
Director: Risk Advisory
GRR Strategic Risk GAU
mvictor@deloitte.co.za

Olebogeng Ramatlhodi
Director: Tax & Legal
Tax WL Customs 202
oramatlhodi@deloitte.co.za

Peter Maxwell
Director: Tax and Legal
Tax WL Customs 202
pmaxwell@deloitte.co.za

Acknowledgements

We would also like to thank Srinivasa Reddy Tummalapalli, Srinivasarao Oguri, and Dinesh Tamilvanan for their important contributions to the research.
Deloitte refers to one or more of Deloitte Touche Tohmatsu Limited, a UK private company limited. Deloitte refers to one or more of Deloitte Touche Tohmatsu Limited ("DTTL"). DTTL's global network of member firms and their related entities. DTTL (also referred to as "Deloitte Global") and each of its member firms are legally separate and independent entities. DTTL does not provide services to clients. Please see www.deloitte.com/about to learn more.

Deloitte is a leading global provider of audit and assurance, consulting, financial advisory, risk advisory, tax and related services. Our network of member firms in more than 150 countries and territories serves four out of five Fortune Global 500® companies. Learn how Deloitte's approximately 286,000 people make an impact that matters at www.deloitte.com.

This communication contains general information only, and none of Deloitte Touche Tohmatsu Limited; its member firms or their related entities (collectively, the "Deloitte network") is, by means of this communication, rendering professional advice or services. Before making any decision or taking any action that may affect your finances or your business, you should consult a qualified professional adviser. No entity in the Deloitte network shall be responsible for any loss whatsoever sustained by any person who relies on this communication.

© 2021. For information, contact Deloitte Touche Tohmatsu Limited.

Designed and produced by Creative Services at Deloitte, Johannesburg. (000/kea)