Deloitte.

2023年全球汽车消费者调查

关键发现：全球焦点国家

2023年2月

十多年来，德勤持续探索汽车消费者趋势，以及受其影响正在快速变化的全球出行生态体系

近年来全球汽车消费者调查的重要观点：

2010年 整体价值成为评价品牌的主要因素

2011年 “驾驶舱技术”及消费体验带来的差异化

2012年 对混合动力汽车的兴趣受成本和便利性驱动，而对网联汽车的兴趣则侧重于安全性

2014年 共享出行崛起，替代购买车辆

2017年 对无人驾驶的兴趣正在提高，但消费者希望看到安全驾驶记录

2018年 全球许多主要市场的消费者逐渐弃用内燃机

2019年 消费者对自动驾驶汽车持观望态度

2020年 消费者是否愿意为先进技术买单的问题仍然存在

2021年 线上购车越来越有吸引力，但大部分消费者仍倾向于亲身体验

2022年 人们对电动汽车的兴趣与日俱增，但对其价格、续航里程和充电时间的担忧依然存在

全球汽车消费者调查为人们提供德勤对出行、智慧城市、车联网、交通的发展以及围绕载人和货运方式等相关问题的看法。

2022年9月至10月期间，德勤调查了24个国家的超过26,000名消费者，就影响汽车产业的多个核心问题方面探索不同的观点，包括消费者对电动汽车（EV）的选用、品牌认知和先进技术部署的兴趣。该年调查的总体目标是为企业确定优先事项和准确部署业务策略和投资提供参考方向。

1	消费者愈加倾向购买电动汽车，但其市场的转变发展程度是否足够?	在恶性通货膨胀环境的压力下，消费者希望降低汽车使用成本，因此人们对电动汽车的兴趣持续增长。然而，要保持这样前进的势头，各个市场正面临着不同的挑战。价格负担能力、里程焦虑和电池安全问题仍然是电动汽车普及的主要障碍。
2	车辆库存危机中的意外之喜	产品质量仍是促成消费者决定选购哪个汽车品牌的首要因素，但作为库存危机的副产品，消费者对可接受交货等待期的预期可能会延长，这为推出具有“按订单生产”风格的新零售模式奠定了基础。
3	消费者对经销商极为信任	当被问及最信任谁时，全球市场大多数受访消费者都提到了与销售或服务经销商的关系，表明汽车价值链中经销商的重要性，也是围绕D2C销售中的关键考虑因素。
4	网联汽车订阅服务或将面临挑战	消费者对于能提供交通拥堵、道路安全和汽车健康状况最新信息的网联汽车功能兴趣较高，但对于联网技术费用，相较于订阅付费，人们更愿意将其纳入汽车预付费用或按次数情况进行支付。

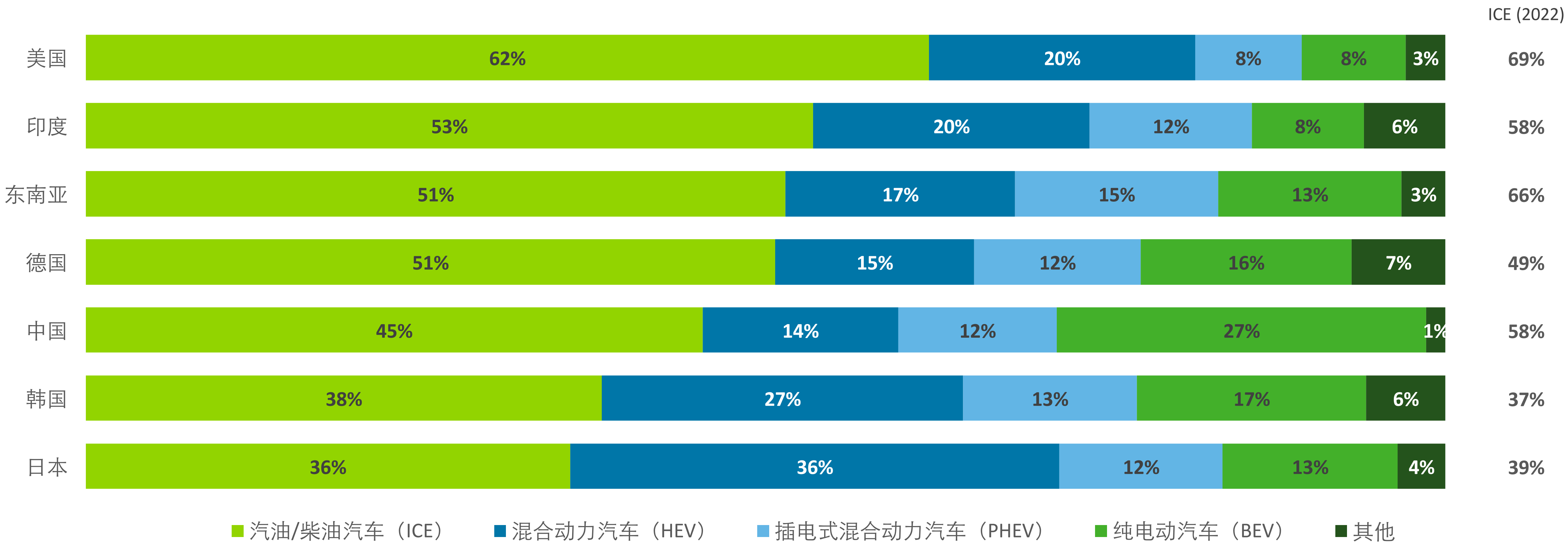
注：以下幻灯片中几个问题的数值之和可能因四舍五入而不等于100%。

1

汽车电气化

取决于各个市场的具体情况，全球正在以不同的速度向电动汽车转变；在中国，纯电动车受到更多消费者的青睐，而其他大多数国家的消费者依然更偏爱混合动力汽车

消费者希望购买的下一辆车的发动机类型



注：其他包括压缩天然气、乙醇和氢燃料电池等发动机类型汽车；回答不知道的未考虑在内。

问题40. 您下辆汽车更偏向于选择什么类型的发动机?

样本容量：n= 703 [中国]；1,128 [德国]；948 [印度]；567 [日本]；806 [韩国]；5,089 [东南亚]；1,766 [美国]

向电动汽车的转变仍主要是基于消费者逐渐意识到电动汽车将大幅降低汽车使用成本

下辆汽车选择电动汽车的首要原因

因素	中国	德国	印度	日本	韩国	东南亚	美国
更低的燃料成本	2	1	1	1	1	1	1
更好的驾驶体验	1	4	2	3	3	2	2
对气候变化的担忧	8	2	5	7	7	6	3
维护保养减少	7	5	3	6	4	3	4
政府奖励/补助/激励计划	6	3	7	2	2	5	5
可能对内燃机车征收额外税款	5	6	8	5	5	8	6
对个人健康的担忧	4	7	6	8	8	7	7
可将汽车作为（例如，家庭）后备电池/电源	3	8	4	4	6	4	8
同行压力	9	9	9	9	9	9	9

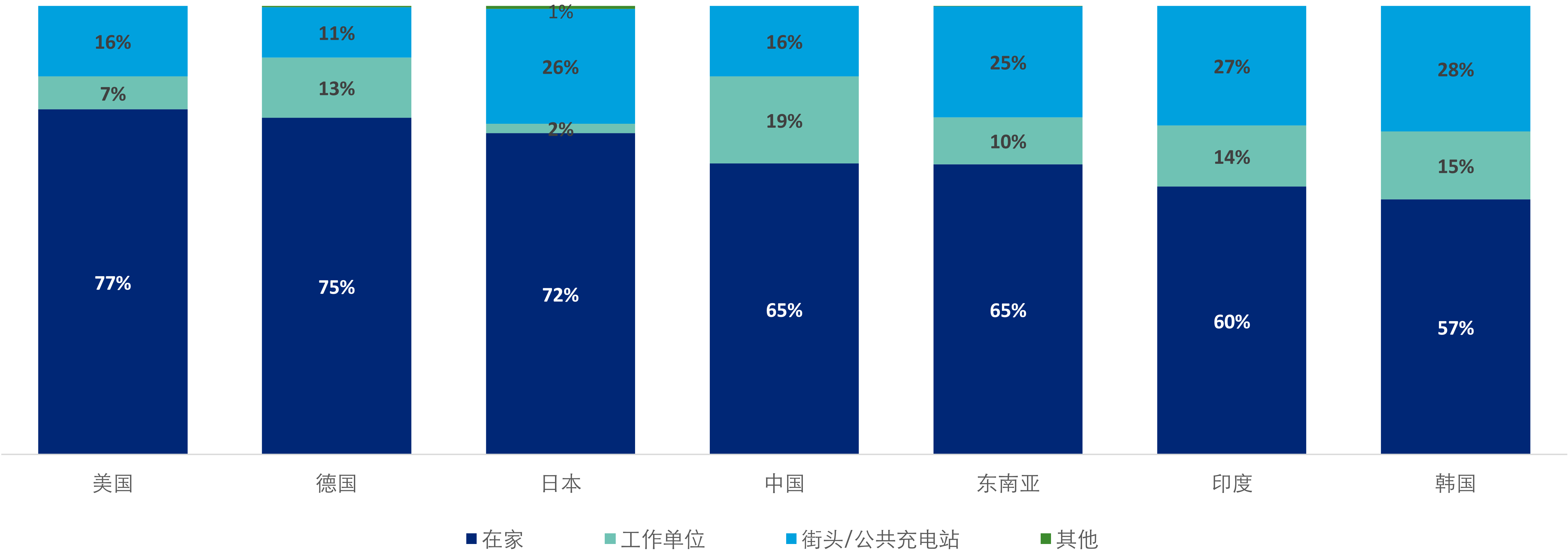
首要原因

问题41. 请将以下因素按其对您购买电动汽车决定的影响（从高到低）进行排序。

样本容量：n = 374 [中国]；478 [德国]；384 [印度]；345 [日本]；453 [韩国]；2,305 [东南亚]；618 [美国]

仍需加建公共充电设备以消除里程焦虑，但实际上大多数人还是会在家给电动汽车充电；然而，这引发了人们对在人口密集的城市环境中设置家用充电设备可行性的质疑

打算更常在以下哪个地方对电动汽车充电：

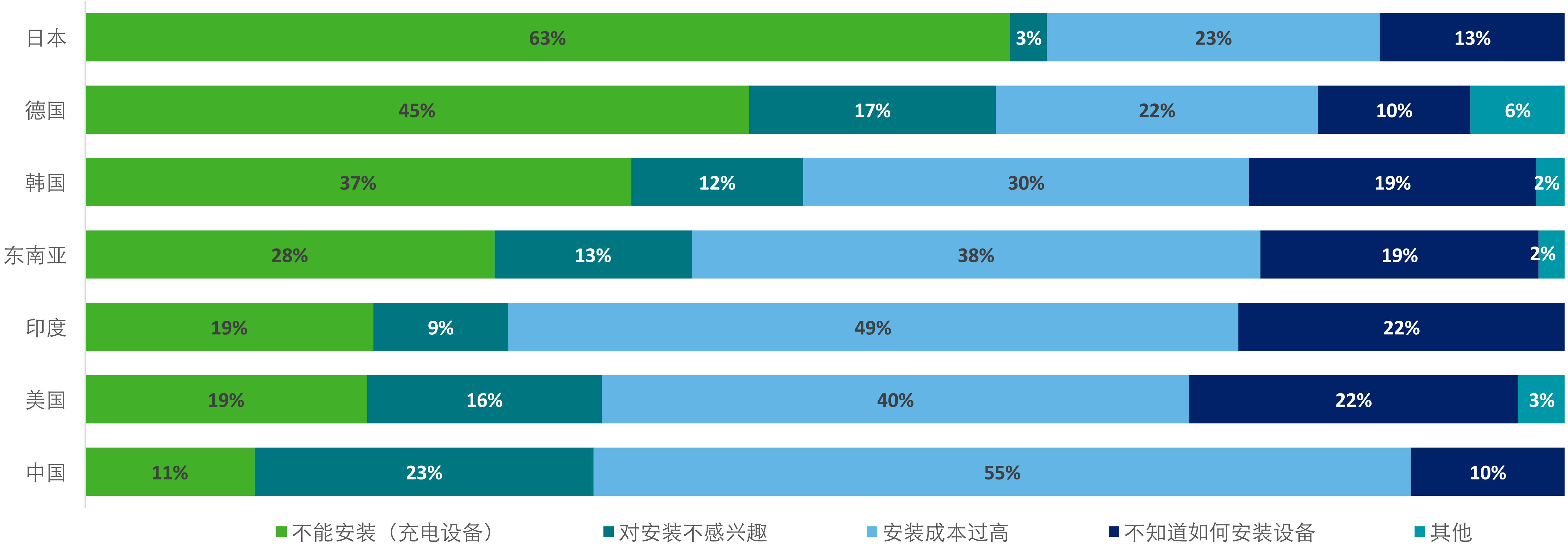


问题43：您打算在哪里为您的电动汽车充电？

样本容量：n= 273 [中国]；313 [德国]；191 [印度]；141 [日本]；239 [韩国]；1,446 [东南亚]；273 [美国]

在某些市场改造家用充电设备可能极具挑战，对于家用充电设备安装成本过高的市场，或可借由电动车使用者的参与增加机会

拒绝在家给电动汽车充电的主要原因

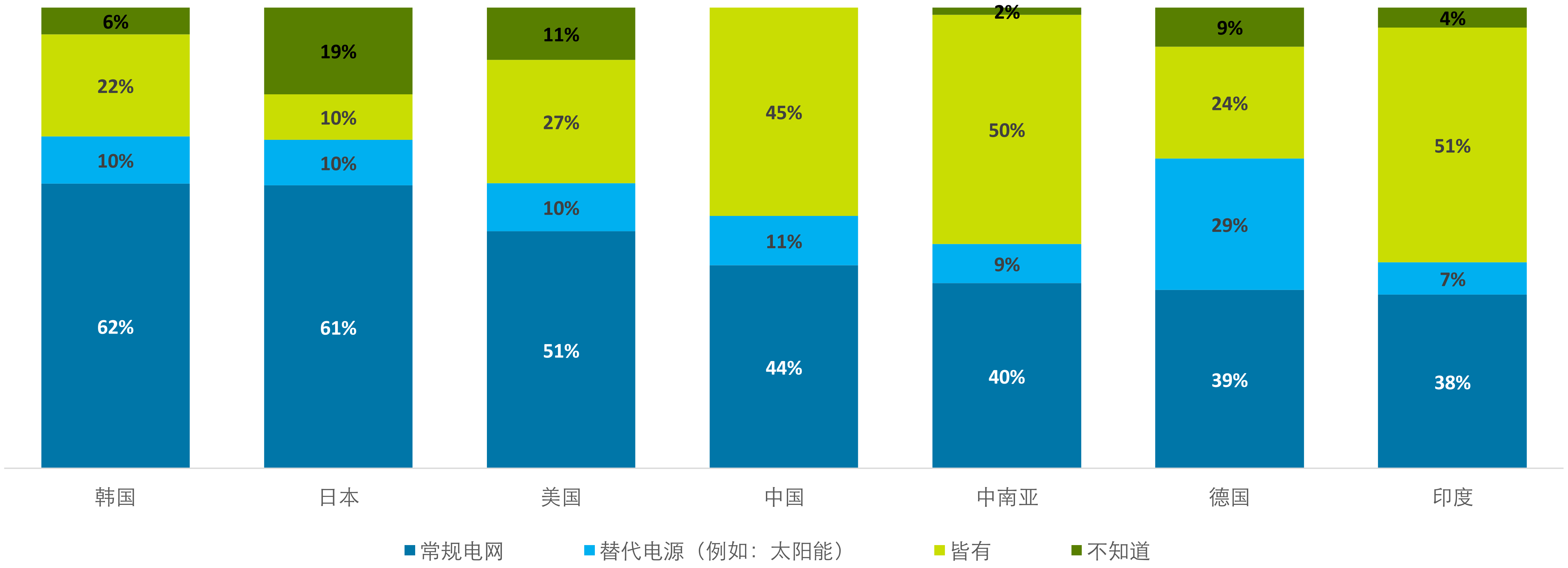


问题45: 您不打算在家给电动汽车充电的主要原因是什么？

样本容量：n= 96 [中国]；78 [德国]；77 [印度]；40 [日本]；103 [韩国]；510 [东南亚]；63 [美国]

对于全球某些市场的电动汽车意向者而言，获得可再生电力非常重要，因为弃用化石燃料所造成的电网容量的负荷问题仍然存在

电动汽车意向者计划如何在家充电



问题44：您打算如何在家给电动汽车充电?

样本容量：n= 177 [中国]；235 [德国]；114 [印度]；101 [日本]；136 [韩国]；936 [东南亚]；210 [美国]

支付便捷的公共充电对电动汽车车主是否采用公共充电方式而言至关重要，对于试图在竞争激烈的领域巩固自身地位的网络运营商来说，这亦是一个关键的差异化因素

最受欢迎的电动汽车公共充电支付方式

支付方法	中国	德国	印度	日本	韩国	东南亚	美国
信用卡/借记卡	17%	47%	28%	51%	57%	31%	56%
智能手机应用程序	53%	40%	45%	36%	32%	52%	25%
预付订阅计划	9%	7%	15%	8%	4%	9%	9%
忠诚度积分	21%	5%	12%	4%	8%	7%	9%
其他	0%	1%	0%	1%	0%	1%	1%

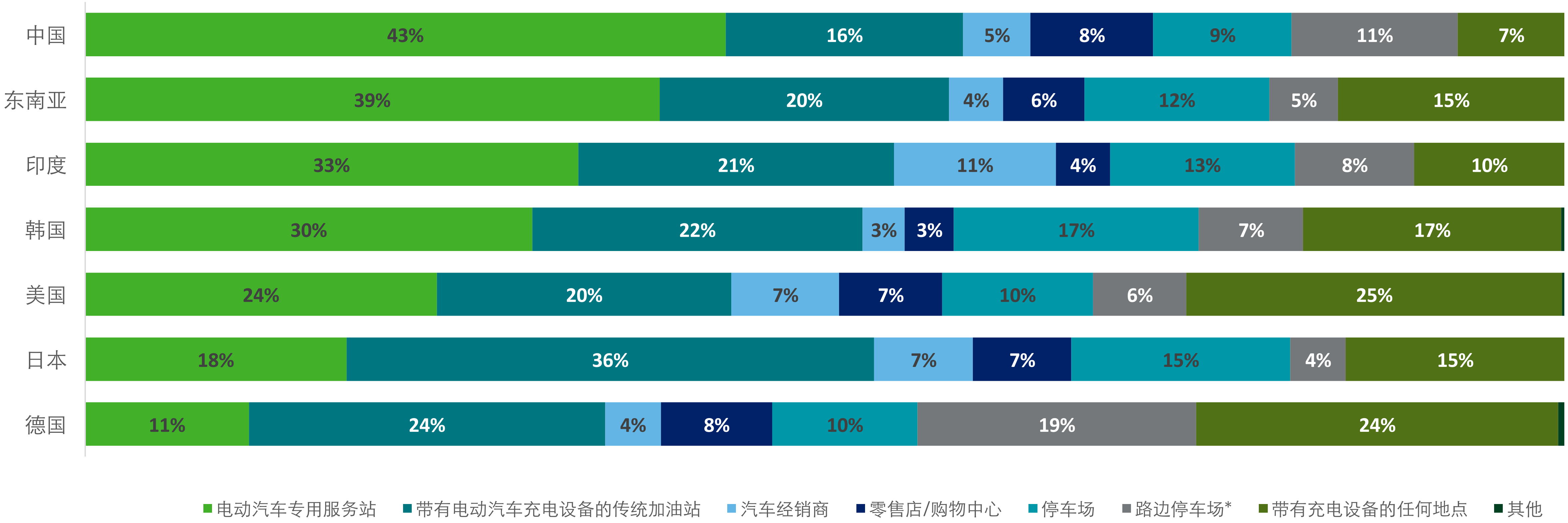
最受欢迎的支付方式

问题49：您最希望如何支付电动汽车公共充电费用？

样本容量：n= 374 [中国]；478 [德国]；384 [印度]；345 [日本]；453 [韩国]；2,305 [东南亚]；618 [美国]

当被迫在旅途中充电时，受访消费者更偏好电动汽车专用服务站或配备有充电设备的传统加油站，但德国和美国的许多受访人士则表示并不在意充电地点只希望在需要时能够充电即可。

打算更常在以下哪个地方对电动汽车充电



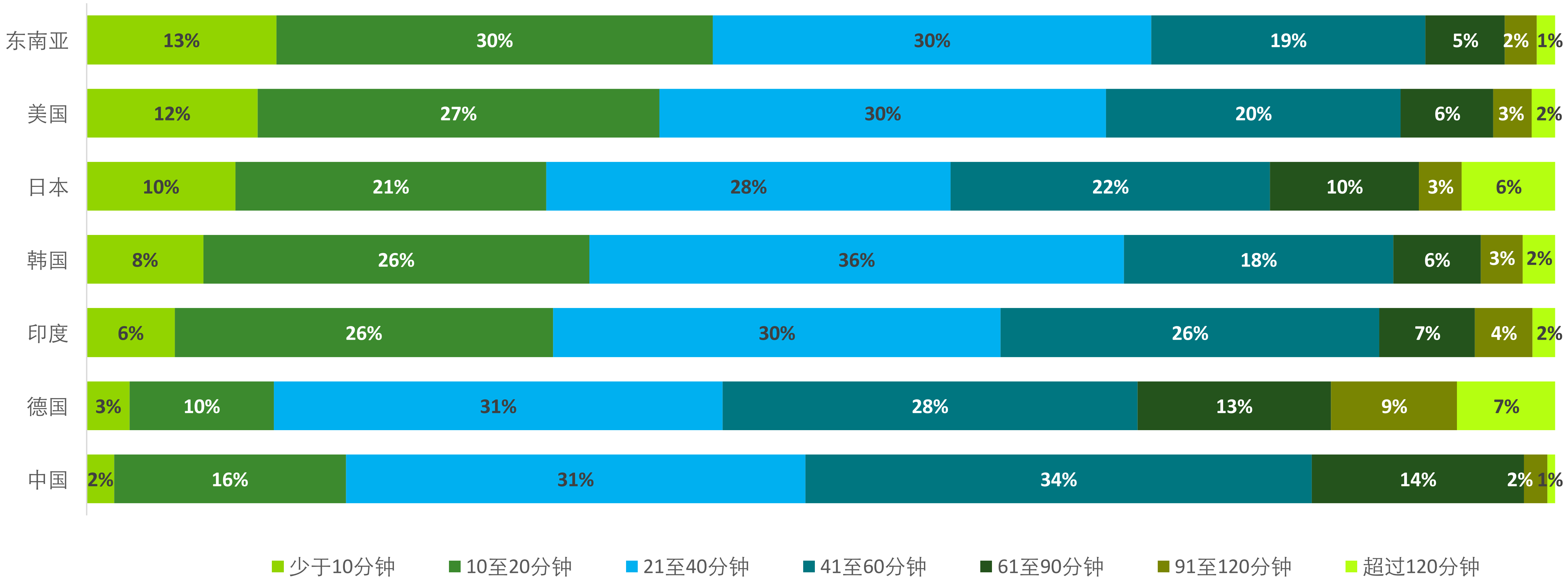
*路边停车场包括社区/公共建筑、酒店等。

问题46：当您出门在外时，以下哪个公共场所最适合为您的电动汽车充电？

样本容量：n= 374 [中国]；478 [德国]；384 [印度]；345 [日本]；453 [韩国]；2,305 [东南亚]；618 [美国]

电动汽车充电时间需向燃油车加油时间看齐一说有点言过其实，大部分市场的受访消费者都愿意等待大于10分钟的时间为汽车充电

电动汽车在公共充电点从没电充至80%的预期等待时间



	少于10分钟	10至20分钟	21至40分钟	41至60分钟	61至90分钟	91至120分钟	超过120分钟
东南亚	13%	30%	30%	19%	5%	2%	1%
美国	12%	27%	30%	20%	6%	3%	2%
日本	10%	21%	28%	22%	10%	3%	6%
韩国	8%	26%	36%	18%	6%	3%	2%
印度	6%	26%	30%	26%	7%	4%	2%
德国	3%	10%	31%	28%	13%	9%	7%
中国	2%	16%	31%	34%	14%	2%	1%

问题47：您预计您的电动汽车在公共充电场所从没电充至80%要花多长时间?

样本容量：n= 374 [中国]；478 [德国]；384 [印度]；345 [日本]；453 [韩国]；2,305 [东南亚]；618 [美国]

由于消费者愿意在充电站花费大量时间，服务提供商可专注于提供Wi-Fi连接、饮料和洗手间等便利设施

车辆在公共场所充电时，受访消费者希望使用的便利设施类型

便利设施	中国	德国	印度	日本	韩国	东南亚	美国
Wi-Fi 连接	52%	60%	62%	61%	53%	72%	64%
洗手间	50%	61%	62%	34%	57%	70%	60%
咖啡/饮料	43%	55%	63%	68%	71%	76%	56%
小吃/简餐	36%	35%	56%	44%	45%	60%	48%
等候室/休息区	52%	30%	52%	58%	49%	60%	46%
全服务式餐厅	40%	23%	42%	23%	9%	47%	31%
私人会议室	16%	5%	29%	16%	5%	20%	12%

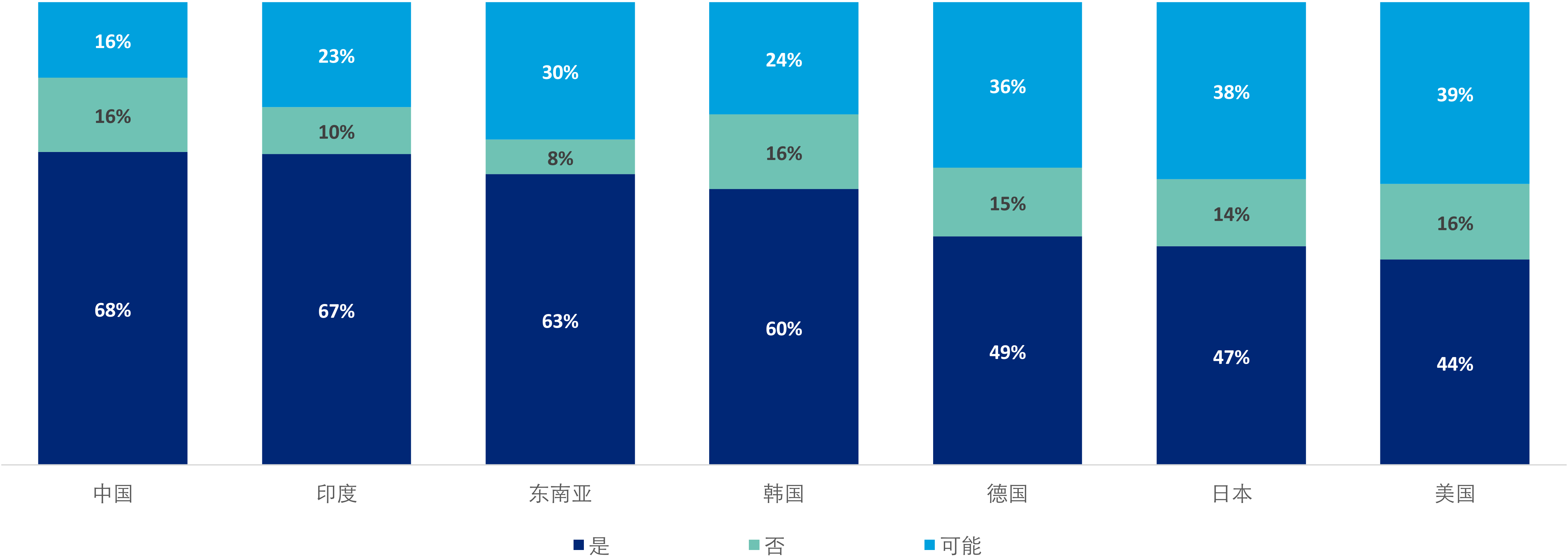
首选

问题48：您的车辆在公共场所充电时，您希望使用何种类型的便利设施?

样本容量：n= 374 [中国]；478 [德国]；384 [印度]；345 [日本]；453 [韩国]；2,305 [东南亚]；618 [美国]

如果用于传统内燃机的环保可持续合成燃料可实现商业化，大多数受访电动汽车意向者会重新考虑其决定

如有适用于传统内燃机的环保可持续合成燃料替代品，会重新考虑选购电动汽车的消费者的百分比。

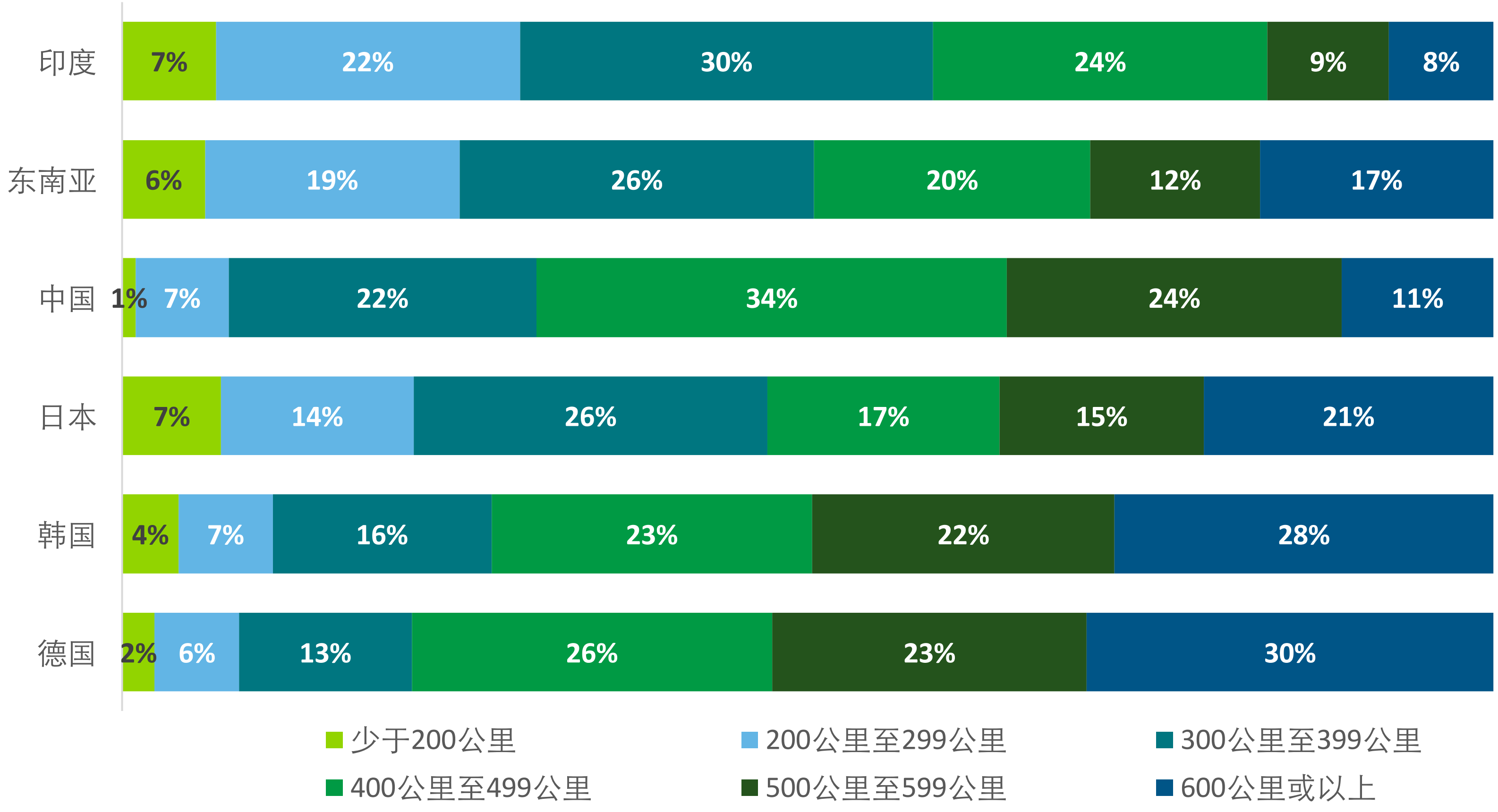


问题42. 在可用于传统内燃机的环保可持续合成替代燃料（即碳中和气体燃料）唾手可得的情况下，您会重新考虑购买电动汽车的决定吗?

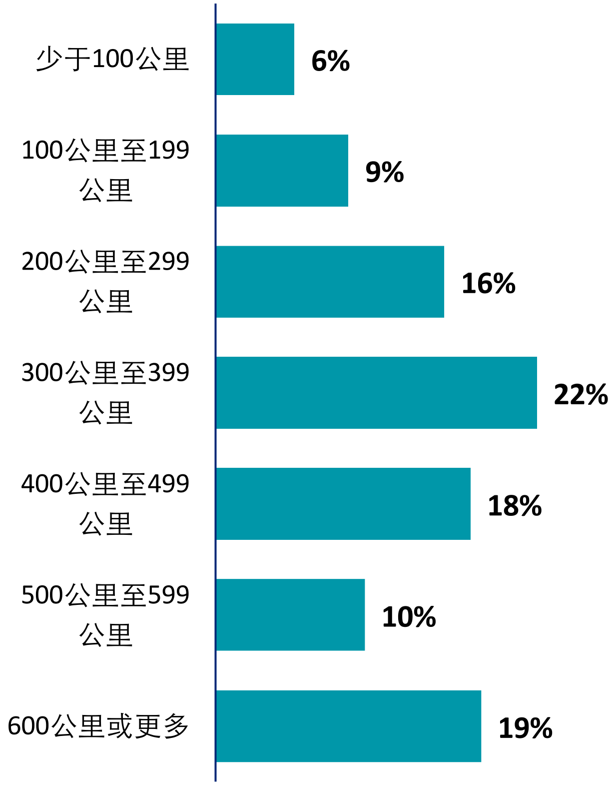
样本容量：n= 374 [中国]；478 [德国]；384 [印度]；345 [日本]；453 [韩国]；2,305 [东南亚]；618 [美国]

全球市场对纯电动汽车续航里程的期望值差异很大，在印度，41%的受访消费者希望续航里程在400公里以上，而在德国，则有79%的消费者希望如此

消费者对纯电动汽车续航里程的期望值



美国消费者对纯电动汽车续航里程的期望值



问题52：满电的纯电动汽车需要达到多长的续航里程，您才会考虑购买一辆？

样本容量：n= 516 [中国]；1,103 [德国]；879 [印度]；597 [日本]；757 [韩国]；4,578 [东南亚]；1,746 [美国]

除了中国将纯电动汽车电池安全放在首位外，其他主要市场的受访消费者通常最关心的问题是充电时间、价格负担能力不足以及里程焦虑（车辆+充电基础设施）

对纯电动汽车最关心的问题

关注点	中国	德国	印度	日本	韩国	东南亚	美国
成本/价格溢价	19%	44%	36%	50%	38%	43%	52%
续航里程	29%	57%	32%	43%	36%	43%	48%
充电所需时间	30%	45%	36%	50%	49%	49%	47%
缺乏公共的电动汽车充电基础设施	29%	47%	43%	46%	42%	54%	46%
缺乏家用充电设备	15%	45%	31%	47%	27%	36%	40%
寒冷天气下的表现	28%	34%	35%	27%	39%	31%	33%
持续充电和运行成本	27%	26%	29%	32%	29%	40%	33%
电池技术的安全问题	32%	30%	40%	30%	46%	40%	30%
缺乏可持续性（即电池制造/回收）	29%	32%	36%	24%	24%	33%	30%
对出行计划的需求上升	16%	23%	24%	10%	12%	25%	27%
在家缺乏替代电源（如太阳能）	17%	26%	33%	25%	19%	34%	23%
缺乏电动汽车/电动汽车技术的知识	20%	13%	33%	21%	18%	34%	22%
纯电动汽车相关的潜在额外税收/税费	19%	10%	27%	15%	20%	25%	20%
转售价值不确定	16%	20%	22%	16%	13%	25%	15%
缺乏选择	13%	13%	25%	10%	11%	19%	14%

受访者选择最多

注：百分比之和超过100%，因为受访者可以选择多个选项。

问题51：您对纯电动汽车最关心的问题是什么？请选择所有适用项。

样本容量：n= 707 [中国]；1,278 [德国]；957 [印度]；670 [日本]；893 [韩国]；5,264 [东南亚]；1,881 [美国]

2

未来购车意向

在日本，车辆功能是品牌选择的驱动力；而其他主要市场的消费者在做出购买决定时更看重产品质量

下一辆汽车品牌选择的主要驱动因素

品牌选择驱动因素	中国	德国	印度	日本	韩国	东南亚	美国
产品质量	48%	54%	62%	47%	55%	71%	61%
汽车功能	31%	32%	48%	50%	33%	52%	38%
汽车性能（如燃油效率、电池续航能力）	17%	20%	41%	42%	45%	45%	37%
整体购置体验	31%	29%	35%	9%	21%	36%	36%
品牌熟知度	36%	35%	37%	19%	26%	34%	31%
价格	6%	31%	22%	42%	23%	32%	31%
过往销售体验	13%	40%	29%	20%	24%	21%	24%
过往服务体验	28%	21%	28%	21%	13%	27%	21%
品牌形象（即环保主义、宗旨、可持续发展）	36%	18%	46%	23%	27%	39%	17%
可选纯电动汽车/混合动力汽车	19%	12%	34%	16%	19%	25%	15%
品牌宣传	29%	8%	31%	9%	11%	21%	11%
品牌联动 （如赞助、合作伙伴等）	23%	5%	26%	4%	6%	15%	7%

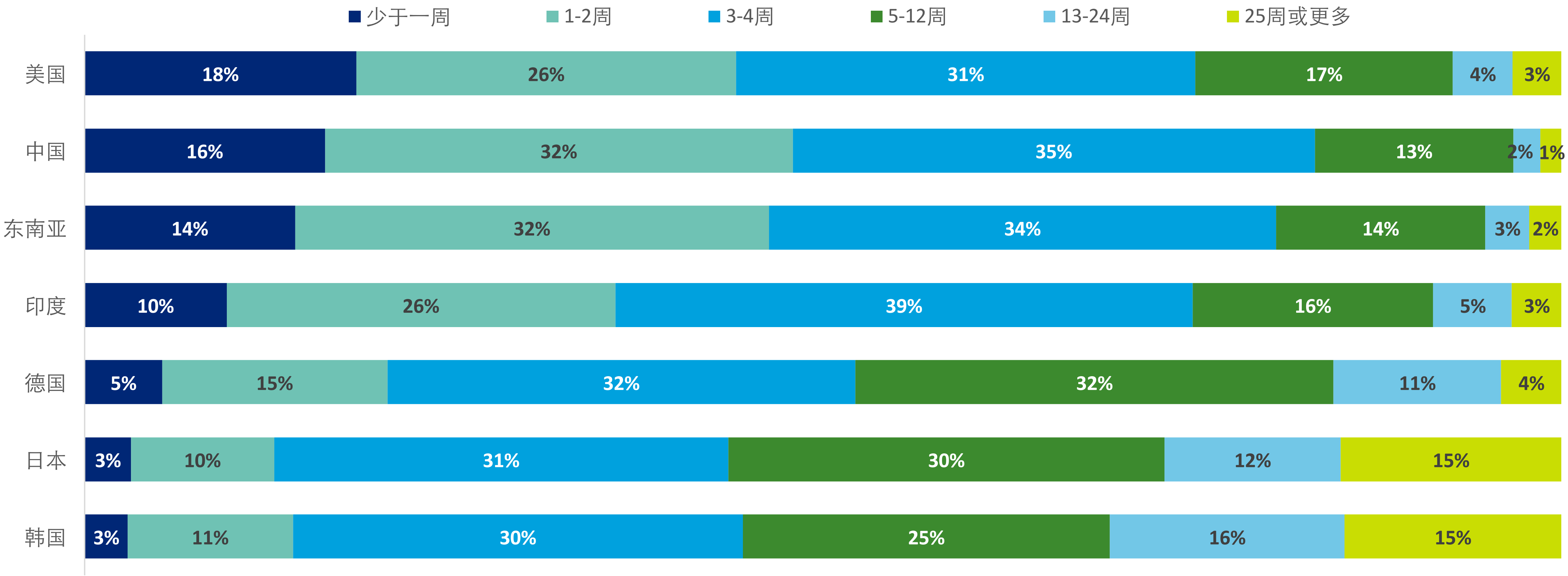
受访者选择最多

问题35. 促使您选择下一辆车品牌最重要的因素是什么？（请选择所有适用项）。

样本容量：n= 707 [中国]；1,278 [德国]；957 [印度]；670 [日本]；893 [韩国]；5,264 [东南亚]；1,881 [美国]

当前的库存危机或将锻炼消费者的耐心，逐步接受更长的新车交付等待时间，为推出“按订单生产”风格的零售模式奠定基础

等待新车交付的可接受时间长度



问题37：在您看来，为了得到了所想要的东西（即功能、颜色等），可接受多长的新车交付等待时间？

样本容量：n= 707 [中国]；1,278 [德国]；957 [印度]；670 [日本]；893 [韩国]；5,264 [东南亚]；1,881 [美国]

对于购车体验期望，大多数市场的受访消费者最重视的是可在定价透明的基础上谈到更好的购车套餐

购车体验中最重要的方面

购车体验方面	中国	德国	印度	日本	韩国	东南亚	美国
获得最好的购车套餐	33%	66%	40%	65%	52%	49%	57%
定价透明	29%	37%	36%	47%	63%	46%	45%
与车辆的实际互动（即试驾）	34%	36%	40%	51%	26%	41%	42%
轻松的体验	18%	27%	14%	12%	13%	14%	29%
所有问题均得到解答	29%	33%	30%	16%	12%	29%	28%
方便的位置	21%	25%	21%	19%	23%	20%	23%
可享有多种融资和基于用途的模式	26%	20%	26%	13%	22%	24%	17%
充分利用时间	24%	11%	24%	14%	15%	16%	16%
可在线完成全部或部分流程	25%	11%	29%	11%	13%	18%	16%
与销售人员建立信任	26%	23%	17%	31%	18%	18%	14%
可满足售后需求	36%	11%	22%	19%	42%	26%	13%

受访者选择最多

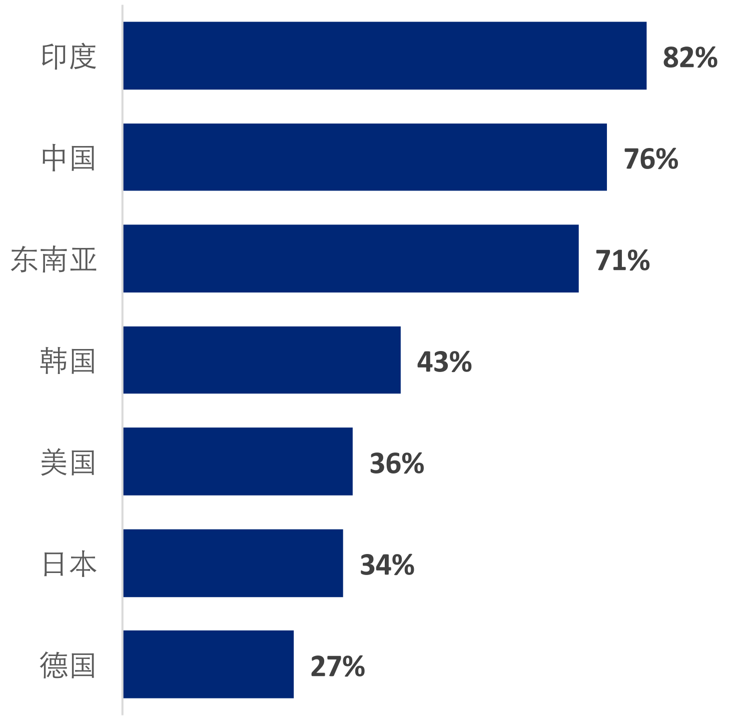
注：百分比之和超过100%，因为受访者可以选择多个选项。

问题59：在寻求购买下一辆车时，购买体验最重要的三个方面是什么？

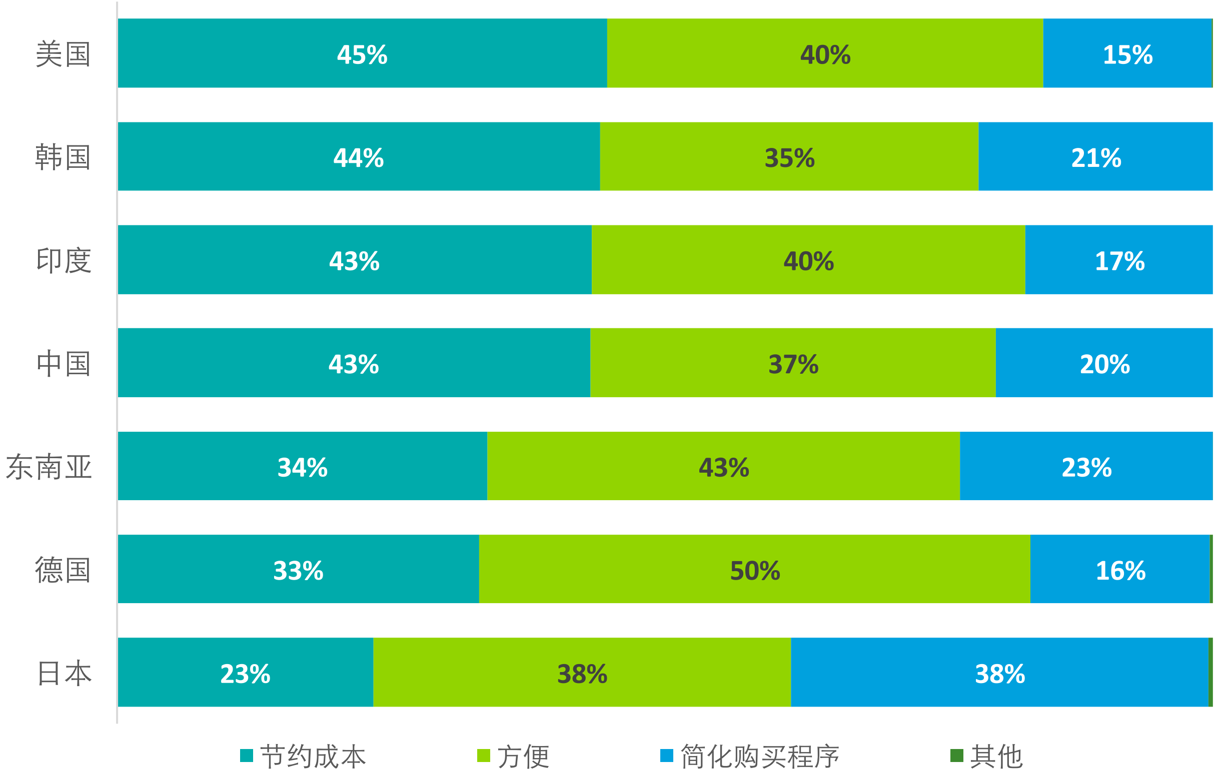
样本容量：n= 707 [中国]；1,278 [德国]；957 [印度]；670 [日本]；893 [韩国]；5,264 [东南亚]；1,881 [美国]

整车制造商着眼于未来的每个潜在利润池，提供自己的保险产品；若干市场的受访消费者对此表现出较高的兴趣，认为这样很方便且具有成本效益

有兴趣直接从制造商处购买保险的受访消费者百分比



对于有兴趣直接从制造商处购买保险的消费者来说，主要好处为……



问题60: 下次购车时，您对直接从汽车制造商处购买保险有多大兴趣？；问题61：您直接从制造商处购买保险主要希望得到什么好处？

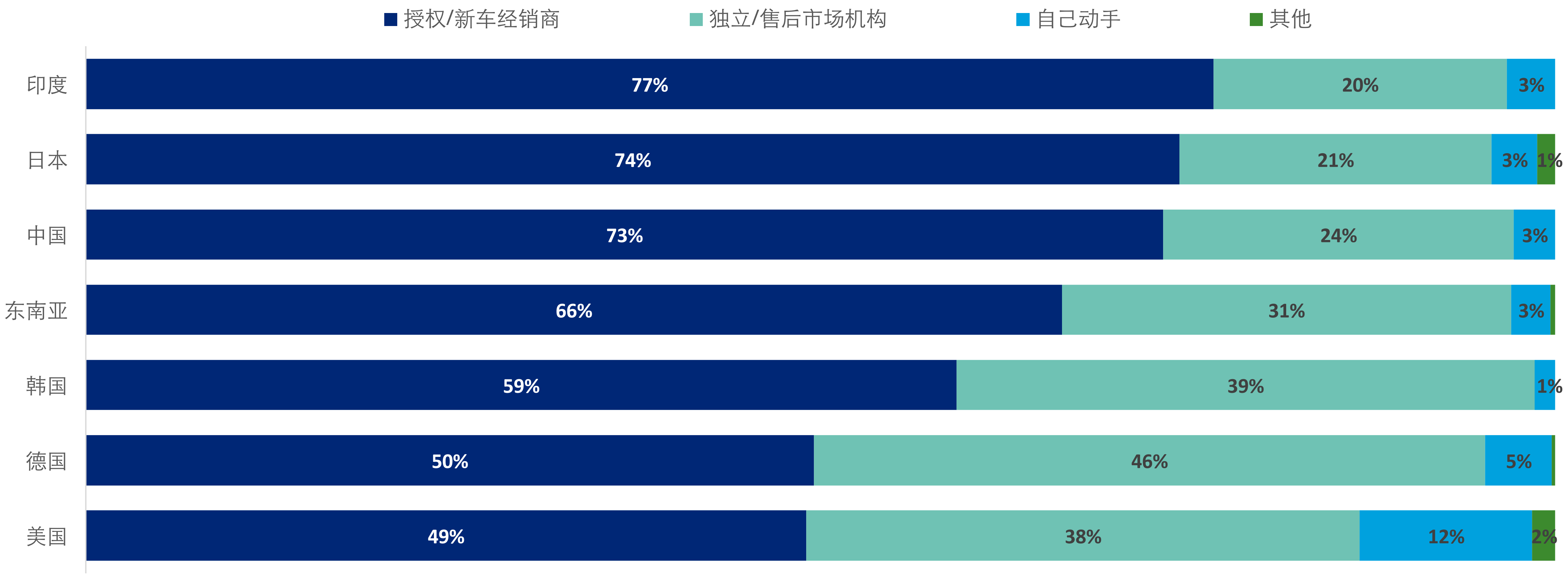
样本容量：对问题60来说n= 707 [中国]；1,278 [德国]；957 [印度]；670 [日本]；893 [韩国]；5,264 [东南亚]；1,881 [美国]；对问题61来说n= 535 [中国]；342 [德国]；783 [印度]；231 [日本]；388 [韩国]；3,750 [东南亚]；684 [美国]

3

汽车品牌及服务体验

印度、日本和中国更倾向于选择新车经销商提供主要服务；而在德国和美国，售后市场企业在汽车服务市场上也占有较大份额

首选车辆服务提供商



问题24. 您通常在哪里维修保养汽车？

样本容量：n= 813 [中国]；1,193 [德国]；847 [印度]；575 [日本]；773 [韩国]；4,401 [东南亚]；1,789 [美国]

受访消费者在经销商处维修保养车辆主要出于对其工作质量的肯定和信任，而选择在售后市场提供商处进行维修保养的主要原因则因市场不同而有较大差异

选择汽车服务提供商的原因（按首选提供商分类）

	经销商					售后市场				
	成本	信任	方便	工作质量	客户体验	成本	信任	方便	工作质量	客户体验
中国	8%	21%	15%	40%	16%	20%	19%	18%	27%	16%
德国	9%	30%	7%	34%	17%	27%	29%	8%	19%	14%
印度	7%	28%	10%	41%	13%	13%	28%	20%	23%	16%
日本	11%	54%	13%	10%	7%	43%	15%	25%	8%	7%
韩国	12%	34%	13%	34%	7%	24%	29%	13%	28%	6%
东南亚	8%	34%	13%	34%	11%	23%	20%	16%	32%	8%
美国	12%	23%	11%	36%	14%	34%	19%	15%	23%	9%

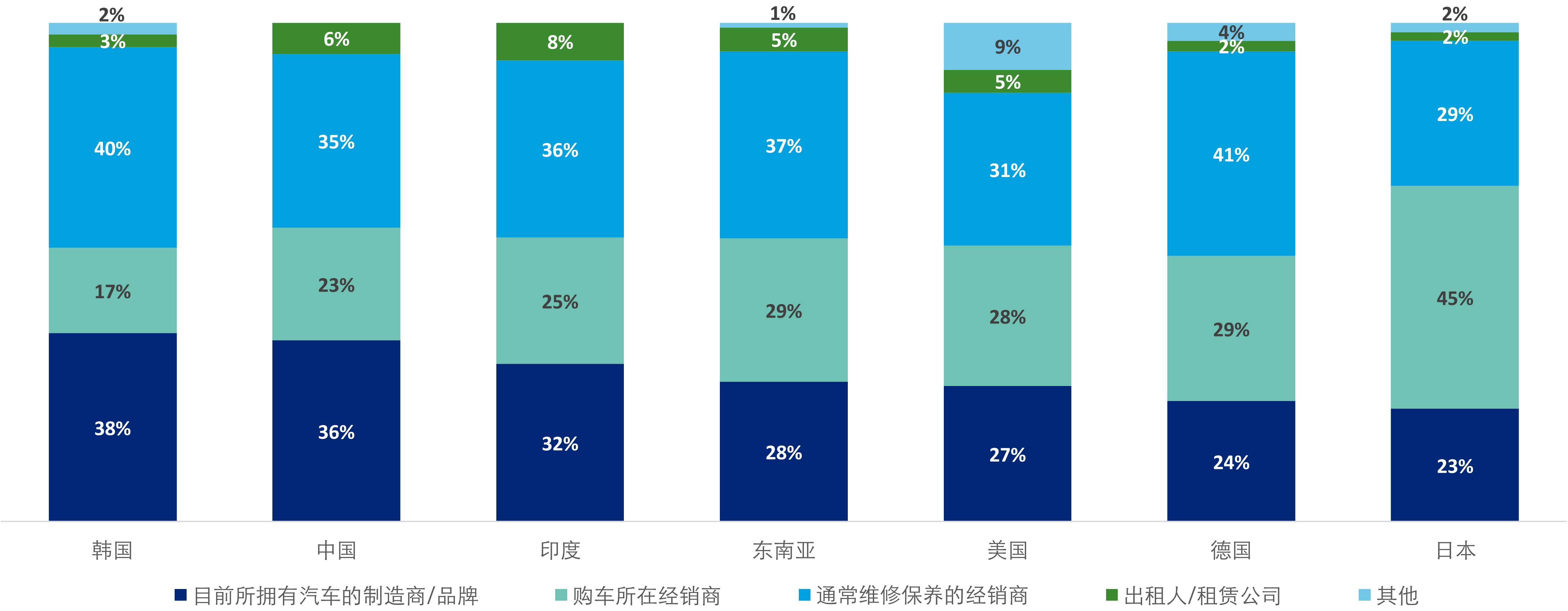
选择的首要原因

问题25. 您首选汽车服务提供商的最重要原因是什么？

样本容量：n= 790 [中国]；1,136 [德国]；819 [印度]；550 [日本]；762 [韩国]；4,268 [东南亚]；1,551 [美国]

各大市场的消费者最信任他们最初购车或常用维修保养车辆的经销商，这表明经销商在维护客户关系方面发挥了重要作用

受访消费者最信任的是……



问题27：您最信任谁？

样本容量：n= 813 [中国]；1,193 [德国]；847 [印度]；575 [日本]；773 [韩国]；4,401 [东南亚]；1,789 [美国]

各大市场的受访消费者均希望品牌APP能够协助其了解车辆特点、安排服务预约以及进行付款；然而，对使用品牌APP进行充电以及公共停车的兴趣则明显较低

汽车品牌应用程序(APP)的重要功能	中国	德国	印度	日本	韩国	东南亚	US
了解车辆特点	36%	37%	42%	46%	53%	52%	36%
安排服务	37%	32%	42%	24%	38%	45%	35%
付款	26%	15%	48%	28%	20%	42%	29%
跟踪预约服务（即成本、时间）	35%	38%	44%	26%	33%	46%	25%
锁上/解锁车辆	15%	14%	26%	20%	24%	31%	24%
跟踪车辆位置	23%	20%	35%	14%	19%	35%	20%
定位经销商	22%	17%	32%	11%	25%	26%	20%
与现场代理聊天	16%	8%	37%	9%	20%	30%	19%
远程启动	19%	6%	23%	9%	21%	23%	19%
创建新车订单并对其定价	23%	15%	26%	15%	17%	22%	17%
购买配件	25%	15%	36%	10%	11%	34%	14%
查看和添加提升车辆的功能	21%	13%	36%	14%	33%	32%	14%
查看和延长电池寿命	13%	16%	28%	17%	28%	29%	12%
查看/兑换忠诚度积分	15%	7%	22%	7%	16%	21%	10%
搜索公共车辆充电接口并支付费用	6%	11%	20%	8%	12%	19%	7%
搜索公共停车位并支付费用	4%	11%	9%	10%	10%	14%	5%

受访者选择最多

问题28. 汽车品牌应用程序最重要的功能是什么？（请选择所有适用项）。

样本容量：n= 813 [中国]；1,193 [德国]；847 [印度]；575 [日本]；773 [韩国]；4,401 [东南亚]；1,789 [美国]

4

车联网

发展中国家市场的受访消费者认为网联汽车会带来更多好处并已准备好分享个人身份信息，而德国和美国的消费者则兴趣有限

消费者对网联汽车功能的兴趣程度（非常感兴趣/有点感兴趣的百分比）

网联汽车功能	中国	德国	印度	日本	韩国	东南亚	美国
维护保养更新和车辆健康报告/警报	80%	56%	84%	62%	66%	81%	60%
交通拥堵信息更新并建议替代路线	78%	58%	83%	66%	75%	81%	58%
提升道路安全并预防潜在碰撞的信息更新	80%	53%	84%	66%	72%	81%	57%
安全路线建议（如避免进入未铺设道路）	82%	43%	85%	63%	68%	78%	54%
根据驾驶习惯提供维护保养成本预估	81%	47%	81%	54%	61%	78%	53%
降低服务费的定制化建议	80%	46%	81%	62%	74%	77%	50%
改善提升驾驶体验的车辆软件无线更新	76%	37%	80%	50%	62%	74%	49%
就近停车（如停车空位信息、预定停车位及支付等）	78%	51%	82%	60%	68%	76%	48%
按优惠价格在车中连接Wi-Fi	77%	38%	78%	57%	60%	71%	47%
定制/优化汽车保险计划（如“按驾驶行为付费”计划）	76%	46%	79%	47%	65%	72%	46%
与行程或目的地相关的非汽车类产品和服务的优惠活动	76%	32%	79%	49%	55%	69%	40%

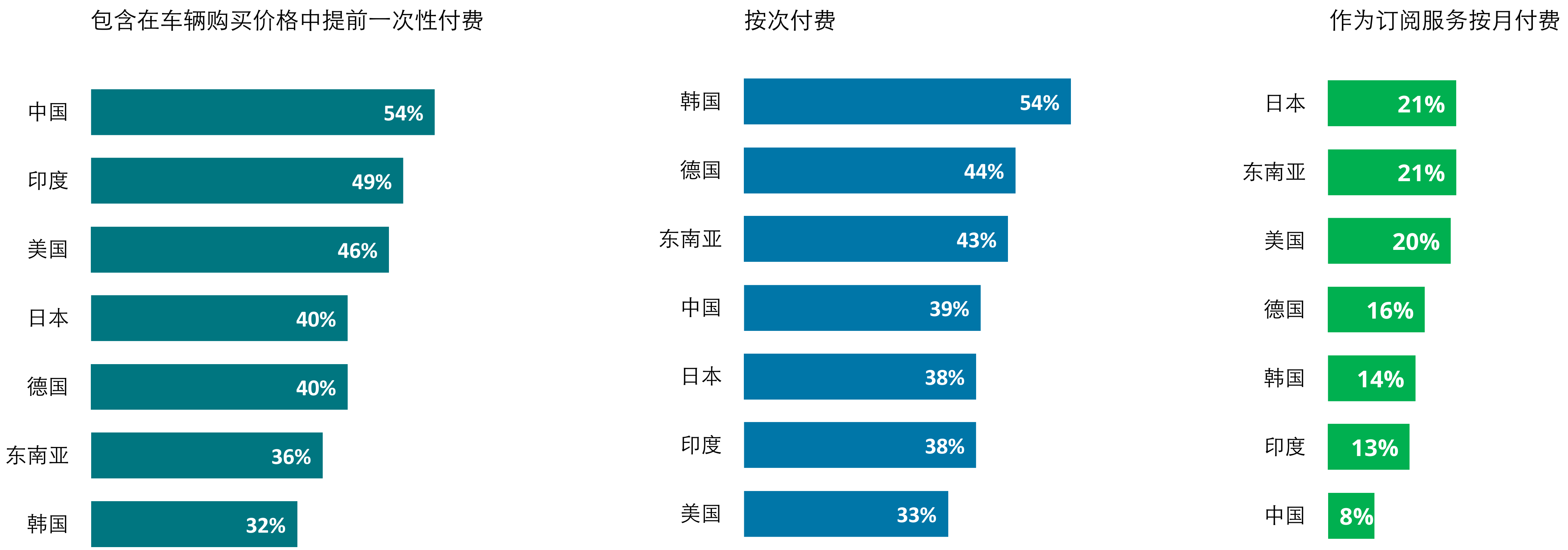
受访者选择最多

问题55: 如果驾驶网联汽车意味着需要向制造商或第三方共享您的个人身份信息及/或汽车/操作数据，您对以下网联汽车的优势有多感兴趣？

样本容量：对于问题55 n= 707 [中国]；1,278 [德国]；957 [印度]；670 [日本]；893 [韩国]；5,264 [东南亚]；1,881 [美国]

移动出行服务提供商希望为网联车辆技术提供订阅服务，这可能会面临挑战，因为相较于订阅服务，大多数受访消费者更愿意预先支付这些功能的费用，作为车辆购买价格的一部分或按次付费

消费者对于附加车联网功能的付费偏好



问题58：您希望如何支付您车辆中的附加车联网功能费用?

样本容量：n = 707 [中国]；1,278 [德国]；957 [印度]； 670 [日本]；893 [韩国]；5,264 [东南亚]；1,881 [美国]

关于调查

关于调查

2023年调查包含了来自全球24个国家的超过26,000名消费者的答复。

北美	样本
加拿大（CA）	1,011
墨西哥（MX）	1,008
美国（US）	2,011

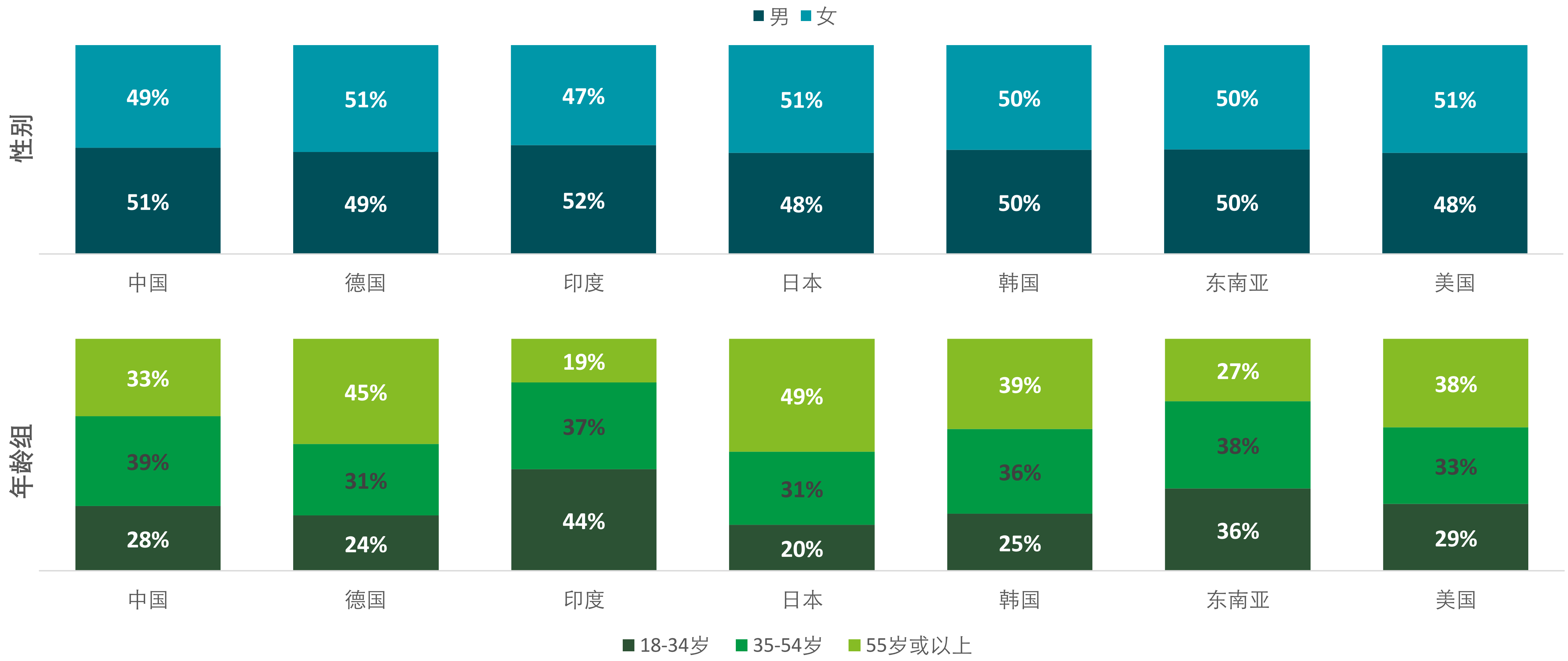
欧洲、中东和非洲	样本
奥地利（AT）	1,004
比利时（BE）	1,019
法国（FR）	1,006
德国（DE）	1,506
意大利（IT）	1,002
波兰（PL）	1,002
南非（ZA）	1,014
西班牙（ES）	1,009
土耳其（TR）	1,006
英国（GB）	1,514

亚太	样本
澳大利亚（(AU）	1,005
中国 (CN)	1,012
印度（IN）	1,003
印度尼西亚（ID）	1,003
日本（JP）	1,017
马来西亚（MY）	1,006
菲律宾（PH）	1,008
韩国（KR）	1,011
加拿大（SG）	1,003
泰国（TH）	1,009
越南（VN）	1,019

调查方法
本调查利用线上样本库，邀请一定驾驶年龄的消费者通过电子邮件完成问卷（已翻译成当地语言）。

注：“样本”表示每个国家的调查对象的数量。

调查统计



注：印度、日本和美国的非二元/非性别认同/选择不回答的比例为1%；东南亚地区包括印度尼西亚、马来西亚、菲律宾、新加坡、泰国和越南市场。

样本容量：n= 1,012 [中国]；1,506 [德国]；1,003 [印度]；1,017 [日本]；1,011 [韩国]；6,048 [东南亚]；2,011 [美国]

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更多洞见和分析，请点击此处或扫描二维码。

2023 Global Automotive Consumer Study

Key findings: Global focus countries

February 2023

For more than a decade, Deloitte has been exploring automotive consumer trends impacting 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
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

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.

From September through October 2022, Deloitte surveyed more than 26,000 consumers in 24 countries to explore opinions regarding a variety of critical issues impacting the automotive sector, including consumer interest in EV adoption, brand perception, and the adoption of connected technologies. The goal of this annual study is to answer important questions that can help companies prioritize and better position their business strategies and investments.

1	**The shift to EVs is happening, but is it moving fast enough in some markets?**	Consumer interest in EVs is growing as consumers, pressured by hyper-inflationary conditions, look to lower their operating costs. However, individual markets face different challenges to maintain forward momentum. Affordability, range anxiety, and battery safety concerns remain as significant barriers to adoption.
2	**An unintended benefit of the vehicle inventory crisis**	Product quality still tops the list of factors driving consumer decisions when it comes to which vehicle brand to buy, but expectations regarding the acceptable length of time to wait for delivery may be starting to stretch out as a lasting by-product of the inventory crisis, potentially opening the door to a new “build-to-order” paradigm.
3	**Dealers engender the most trust among consumers**	When asked who they trust most, a majority of surveyed consumers across global markets point to the relationship they have with either their selling or servicing dealer, signaling the important role dealers play in the automotive value chain and a key consideration in the conversation around direct-to-consumer sales.
4	**Subscriptions to connected vehicle services could be a challenge**	Consumer interest in connected vehicle features that provide updates regarding traffic congestion, road safety, and vehicle health status are relatively high, but people would much rather pay for connected technologies as part of the upfront cost of the vehicle or on a per use basis compared to a subscription.

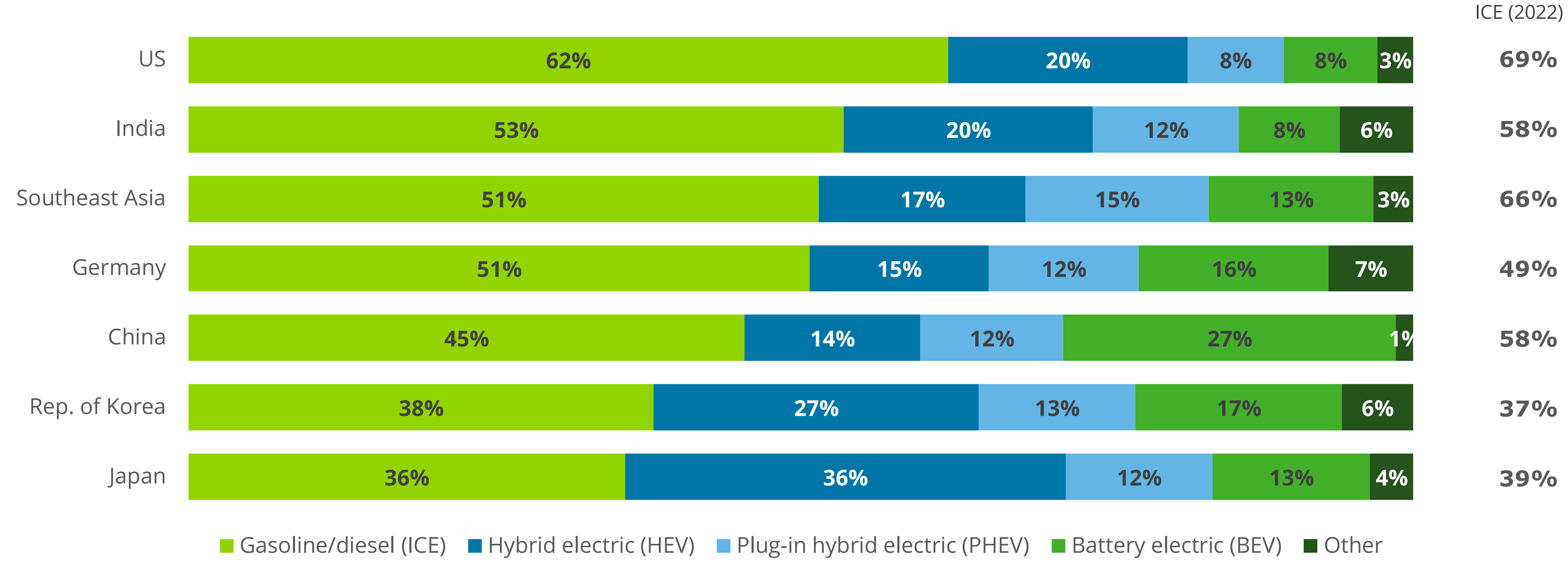
Note: Sum of the values in selected charts may not add to 100% due to rounding.

1

Vehicle electrification

The global shift to electrified vehicles is happening at very different speeds depending on the individual market. Interest in hybrid technology also continues to outstrip full battery electric vehicles (BEVs) in most countries except China.

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; don't know responses weren't considered.

Q40. What type of engine would you prefer in your next vehicle?

Sample size: n= 703 [China]; 1,128 [Germany]; 948 [India]; 567 [Japan]; 806 [Republic of Korea]; 5,089 [Southeast Asia]; 1,766 [US]

Despite government messaging around the need to address climate change, the shift to EVs is primarily based on a strong consumer perception that it will significantly reduce vehicle operating costs.

Top reasons to choose an EV as next vehicle

Factors	China	Germany	India	Japan	Rep. of Korea	Southeast Asia	US
Lower fuel costs	2	1	1	1	1	1	1
Better driving experience	1	4	2	3	3	2	2
Concern about climate change	8	2	5	7	7	6	3
Less maintenance	7	5	3	6	4	3	4
Government incentives / subsidies / stimulus programs	6	3	7	2	2	5	5
Potential for extra taxes/levies applied to internal combustion vehicles	5	6	8	5	5	8	6
Concern about personal health	4	7	6	8	8	7	7
Ability to use the vehicle as a backup battery / power source (e.g., for home)	3	8	4	4	6	4	8
Peer pressure	9	9	9	9	9	9	9

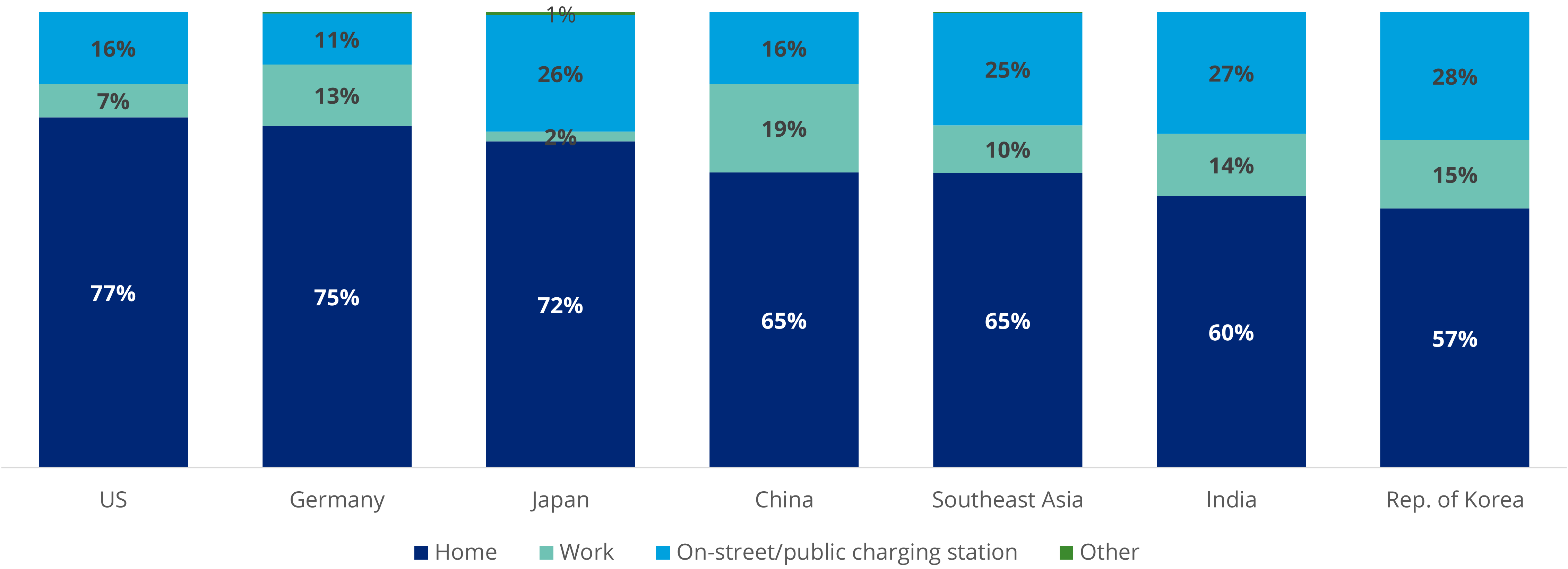
Top reason

Q41. Please rank the following factors in terms of their impact on your decision to acquire an electrified vehicle (highest to lowest).

Sample size: n = 374 [China]; 478 [Germany]; 384 [India]; 345 [Japan]; 453 [Republic of Korea]; 2,305 [Southeast Asia]; 618 [US]

A focus on building public charging capacity is needed to address concerns over range anxiety, but the reality of day-to-day usage means most people will charge their EVs at home. However, this raises questions around the availability of home chargers in densely populated, urban environments.

Expecting to charge electrified vehicle most often at…

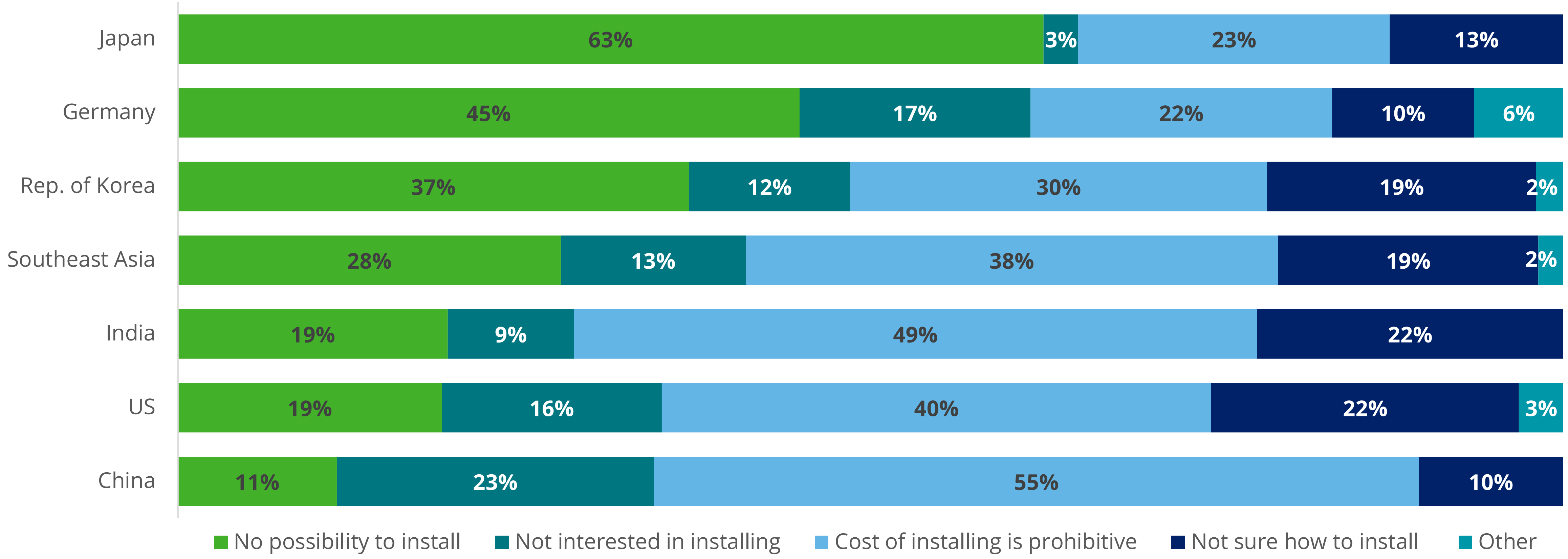


Q43: Where do you expect to charge your electrified vehicle most often?

Sample size: n= 273 [China]; 313 [Germany]; 191 [India]; 141 [Japan]; 239 [Republic of Korea]; 1,446 [Southeast Asia]; 273 [US]

Retrofitting home chargers in some markets may be a significant challenge, but there may be an opportunity to engage consumers in markets where the primary barrier to home charging is cost.

Main reason not to charge an EV at home

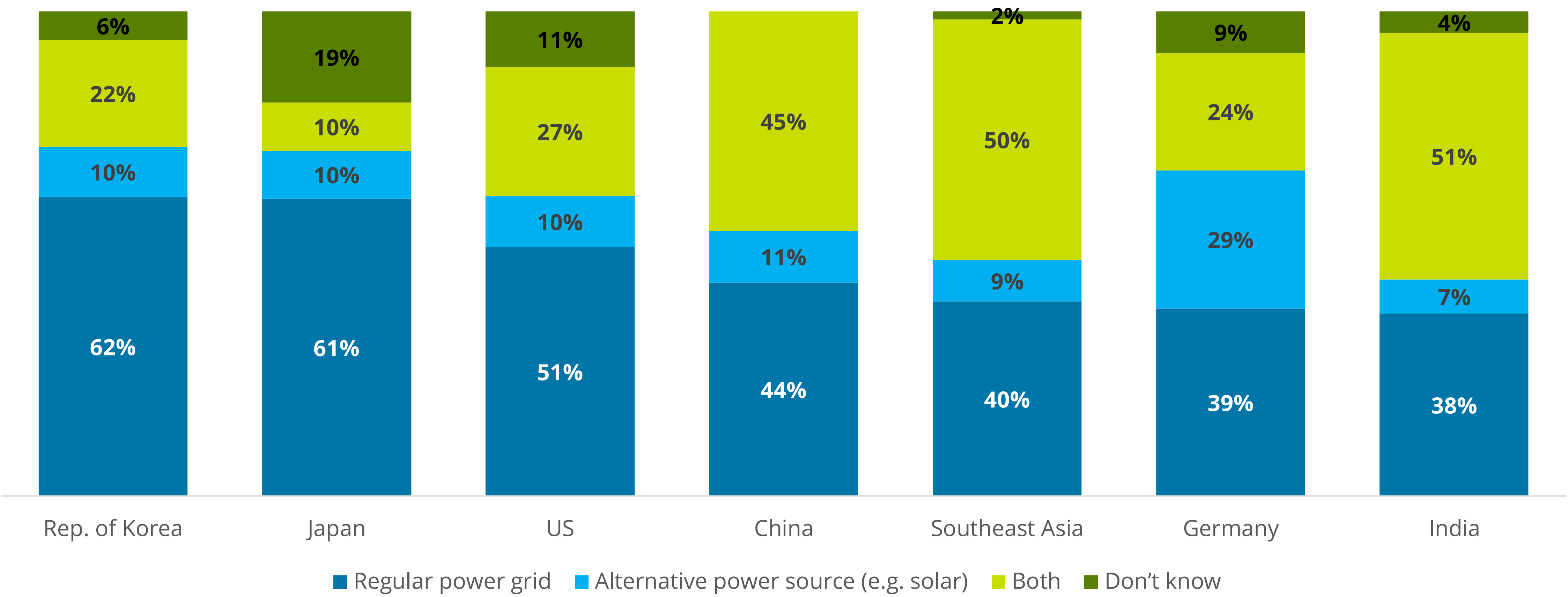


Q45: What is the main reason you do not intend to charge your electrified vehicle at home?

Sample size: n= 96 [China]; 78 [Germany]; 77 [India]; 40 [Japan]; 103 [Republic of Korea]; 510 [Southeast Asia]; 63 [US]

Availability of renewable power is important for EV intenders in some global markets as questions remain around grid capacity to support the shift away from fossil fuels for mobility.

How EV intenders plan to charge their vehicle at home



Q44: How do you intend to charge your electrified vehicle at home?

Sample size: n= 177 [China]; 235 [Germany]; 114 [India]; 101 [Japan]; 136 [Republic of Korea]; 936 [Southeast Asia]; 210 [US]

Making it easy for EV owners to pay for public charging is critically important for overall adoption and may be a key differentiator for network operators trying to solidify their position in a hyper-competitive space.

Most preferred way to pay for public EV charging

Payment methods	China	Germany	India	Japan	Rep. of Korea	Southeast Asia	US
Credit/debit card	17%	47%	28%	51%	57%	31%	56%
Smartphone app	53%	40%	45%	36%	32%	52%	25%
Pre-paid subscription plan	9%	7%	15%	8%	4%	9%	9%
Loyalty points	21%	5%	12%	4%	8%	7%	9%
Other	0%	1%	0%	1%	0%	1%	1%

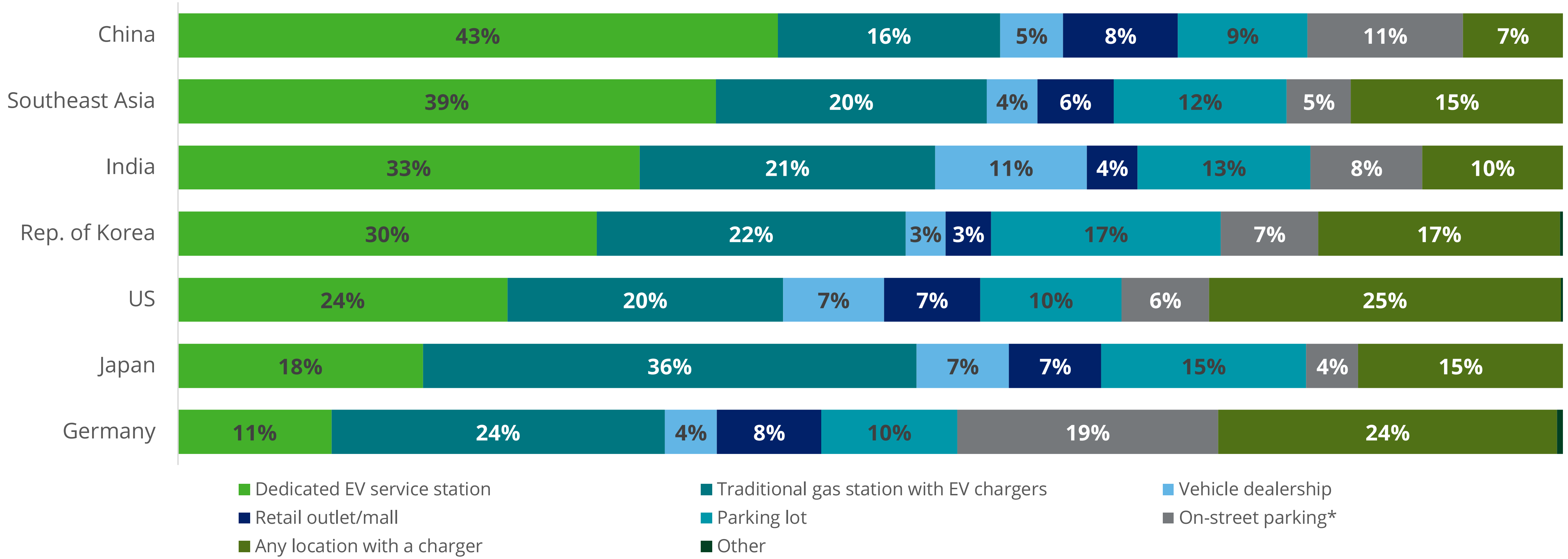
Most preferred mode of payment

Q49: How would you most prefer to pay for public EV charging?

Sample size: n= 374 [China]; 478 [Germany]; 384 [India]; 345 [Japan]; 453 [Republic of Korea]; 2,305 [Southeast Asia]; 618 [US]

When forced to charge on the go, surveyed consumers would most prefer either a dedicated EV service station or a traditional gas station equipped with chargers, but a significant number of people surveyed in Germany and the US simply want access to charging when they need it regardless of location.

Expecting to charge electrified vehicle most often at…



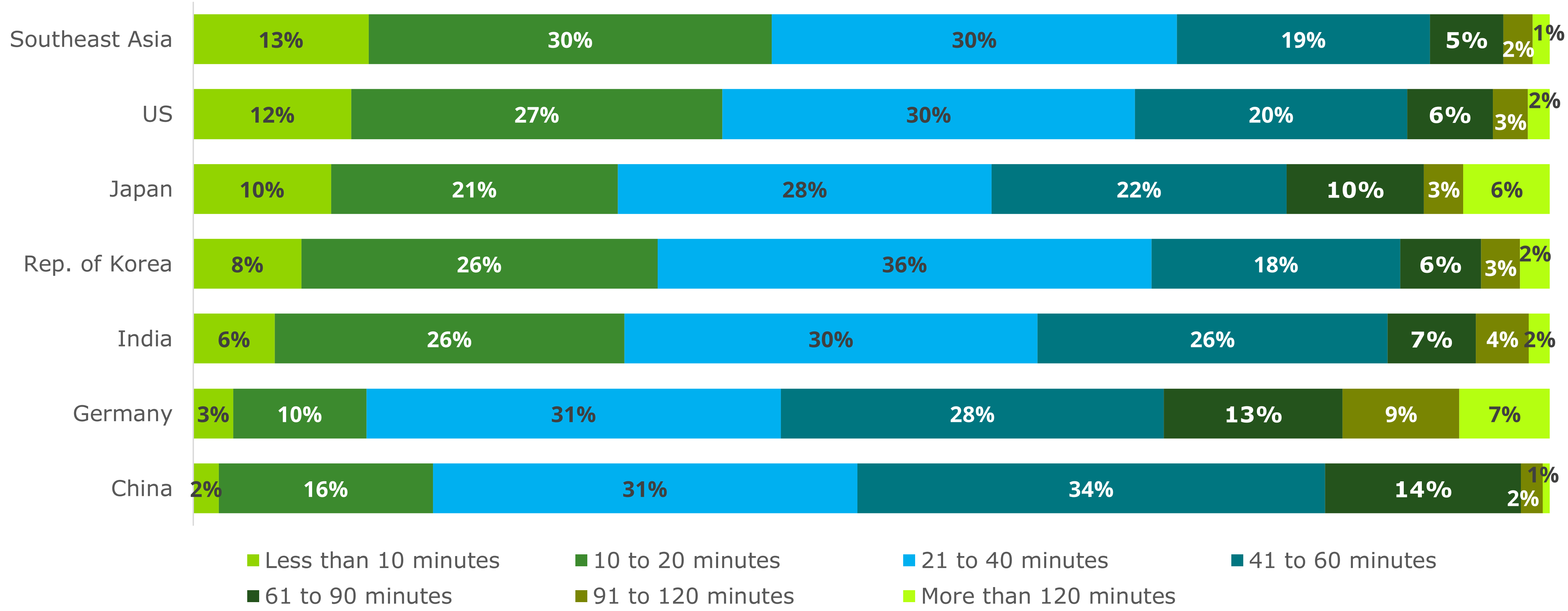
*On-street parking includes community/public buildings, hotels, etc.

Q46: Which of the following public locations makes the most sense to charge your EV when you are away from home?

Sample size: n= 374 [China]; 478 [Germany]; 384 [India]; 345 [Japan]; 453 [Republic of Korea]; 2,305 [Southeast Asia]; 618 [US]

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 substantially longer than 10 minutes to refuel.

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



Q47: How long would you expect it to take to charge your EV from empty to 80% at a public charging location?

Sample size: n= 374 [China]; 478 [Germany]; 384 [India]; 345 [Japan]; 453 [Republic of Korea]; 2,305 [Southeast Asia]; 618 [US]

With consumers ready to spend a significant amount of time at charging stations, service providers can focus on amenities like Wi-Fi connectivity, beverages, and restrooms.

Type of amenities that the surveyed consumers want to have access to while their vehicle is charging at a public location

Amenities	China	Germany	India	Japan	Rep. of Korea	Southeast Asia	US
Wi-Fi connectivity	52%	60%	62%	61%	53%	72%	64%
Washrooms	50%	61%	62%	34%	57%	70%	60%
Coffee / beverages	43%	55%	63%	68%	71%	76%	56%
Snacks / light meals	36%	35%	56%	44%	45%	60%	48%
Lounge / sitting area	52%	30%	52%	58%	49%	60%	46%
Full-service restaurant	40%	23%	42%	23%	9%	47%	31%
Private meeting room	16%	5%	29%	16%	5%	20%	12%

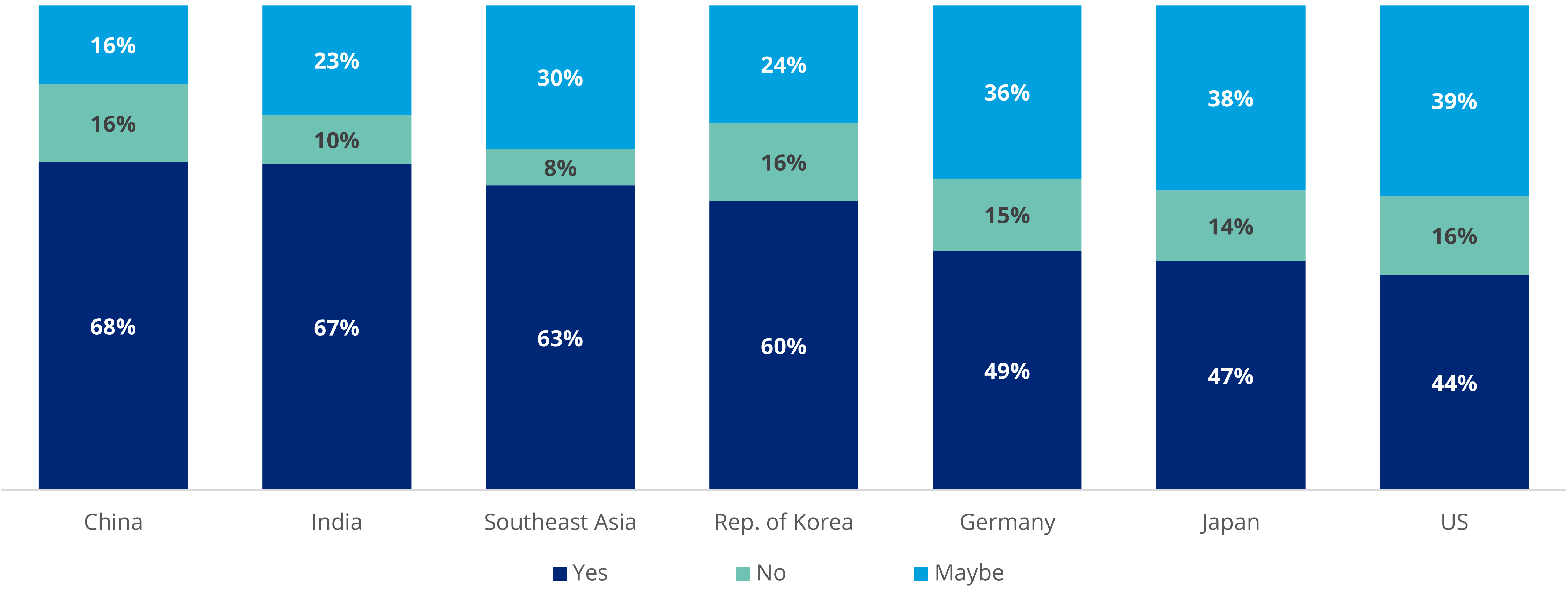
Top choice

Q48: What type of amenities would you want to have access to while your vehicle is charging at a public location?

Sample size: n= 374 [China]; 478 [Germany]; 384 [India]; 345 [Japan]; 453 [Republic of Korea]; 2,305 [Southeast Asia]; 618 [US]

In a scenario where an environmentally sustainable, synthetic fuel for use in traditional combustion engines was commercially available, a significant number of surveyed EV intenders would rethink their decision.

Percentage of consumers who would rethink to purchase an EV if an environmentally sustainable, synthetic fuel alternative is available for traditional (ICE) engines

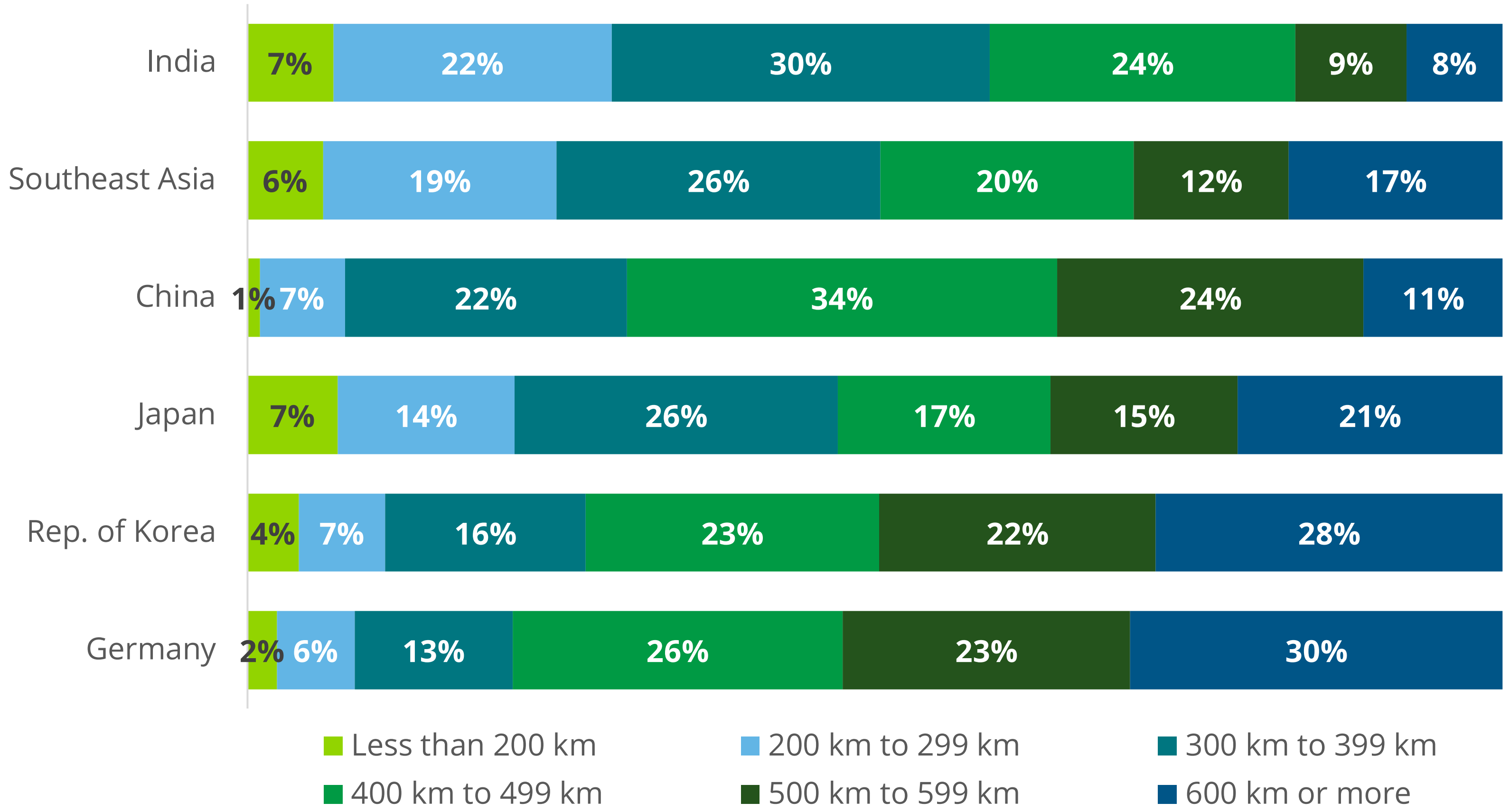


Q42. In a scenario where an environmentally sustainable, synthetic fuel alternative (i.e., carbon-neutral gas) that would work in traditional internal combustion engines was readily available, would you rethink your decision to purchase an EV?

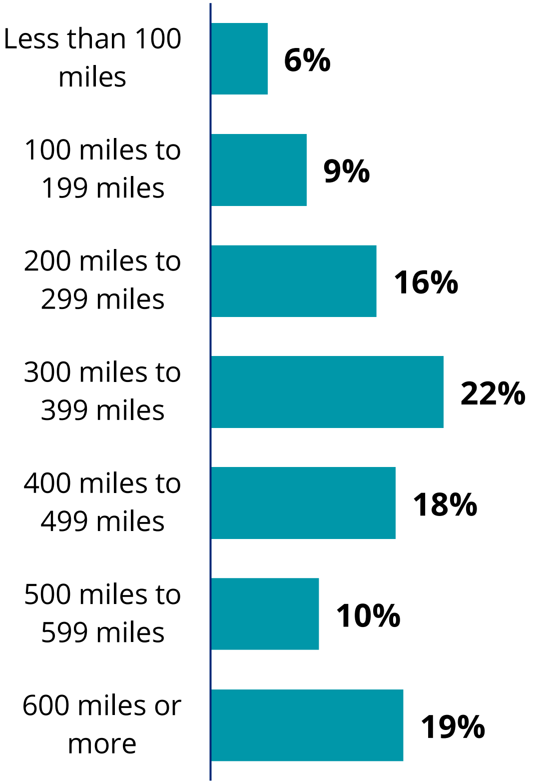
Sample size: n= 374 [China]; 478 [Germany]; 384 [India]; 345 [Japan]; 453 [Republic of Korea]; 2,305 [Southeast Asia]; 618 [US]

Expectations for BEV driving range vary significantly by global market as 41% of surveyed consumers in India want 400 km or more, whereas 79% of consumers in Germany said the same.

Consumer expectations on BEV driving range



Consumer expectations on BEV driving range in US



Q52: How much driving range would a fully charged all-battery electric vehicle need to have in order for you to consider acquiring one?

Sample size: n= 516 [China]; 1,103 [Germany]; 879 [India]; 597 [Japan]; 757 [Republic of Korea]; 4,578 [Southeast Asia]; 1,746 [US]

With the exception of China where BEV battery safety is top of mind, surveyed consumers are generally most concerned about charging time, a lack of affordability, and range anxiety (vehicle + charging infrastructure).

Greatest concern regarding all battery-powered electric vehicles

Concern	China	Germany	India	Japan	Rep. of Korea	Southeast Asia	US
Cost/price premium	19%	44%	36%	50%	38%	43%	52%
Driving range	29%	57%	32%	43%	36%	43%	48%
Time required to charge	30%	45%	36%	50%	49%	49%	47%
Lack of public electric vehicle charging infrastructure	29%	47%	43%	46%	42%	54%	46%
Lack of charger at home	15%	45%	31%	47%	27%	36%	40%
Cold weather performance	28%	34%	35%	27%	39%	31%	33%
Ongoing charging and running costs	27%	26%	29%	32%	29%	40%	33%
Safety concerns with battery technology	32%	30%	40%	30%	46%	40%	30%
Lack of sustainability (i.e., battery manufacturing/recycling)	29%	32%	36%	24%	24%	33%	30%
Increased need to plan trips	16%	23%	24%	10%	12%	25%	27%
Lack of alternate power source (e.g., solar) at home	17%	26%	33%	25%	19%	34%	23%
Lack of knowledge about EVs/EV technology	20%	13%	33%	21%	18%	34%	22%
Potential for extra taxes/levies associated with BEVs	19%	10%	27%	15%	20%	25%	20%
Uncertain resale value	16%	20%	22%	16%	13%	25%	15%
Lack of choice	13%	13%	25%	10%	11%	19%	14%

Most commonly cited

Note: Sum of the percentages exceed 100% as respondents can select multiple options.

Q51: What are your biggest concerns regarding all battery-powered electric vehicles? Please select all that apply.

Sample size: n= 707 [China]; 1,278 [Germany]; 957 [India]; 670 [Japan]; 893 [Republic of Korea]; 5,264 [Southeast Asia]; 1,881 [US]

2

Future vehicle intentions

Except for Japan where vehicle features are the driving force behind choosing a brand, consumers rely on a perception of product quality when making a purchase decision.

Most important factors driving the choice of brand for next vehicle

Drivers of brand choice	China	Germany	India	Japan	Rep. of Korea	Southeast Asia	US
Product quality	48%	54%	62%	47%	55%	71%	61%
Vehicle features	31%	32%	48%	50%	33%	52%	38%
Vehicle performance (e.g., fuel efficiency, battery range)	17%	20%	41%	42%	45%	45%	37%
Quality of overall ownership experience	31%	29%	35%	9%	21%	36%	36%
Brand familiarity	36%	35%	37%	19%	26%	34%	31%
Price	6%	31%	22%	42%	23%	32%	31%
Previous sales experience	13%	40%	29%	20%	24%	21%	24%
Previous service experience	28%	21%	28%	21%	13%	27%	21%
Brand image (i.e., environmentalism, purpose, sustainability)	36%	18%	46%	23%	27%	39%	17%
Availability of battery electric vehicles/hybrid options	19%	12%	34%	16%	19%	25%	15%
Brand advertising	29%	8%	31%	9%	11%	21%	11%
Brand affiliations (e.g., sponsorships, partners)	23%	5%	26%	4%	6%	15%	7%

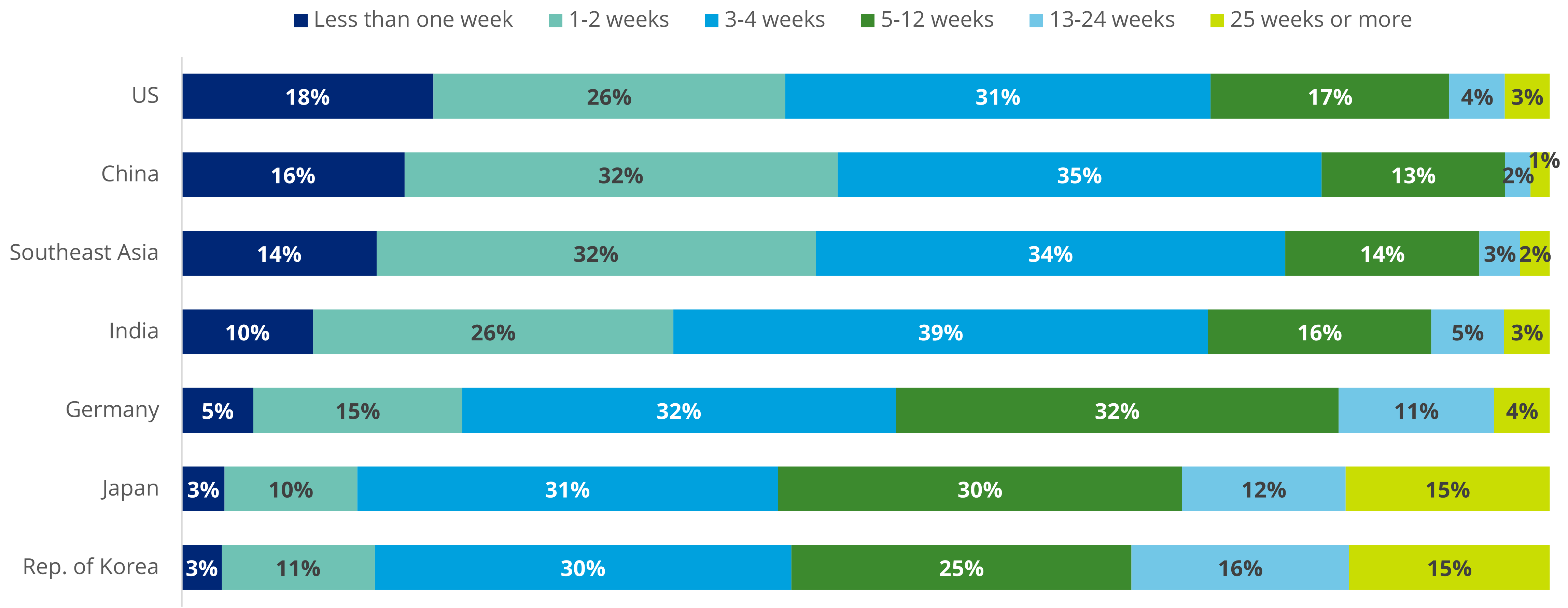
Most commonly cited

Q35. What are the most important factors driving the choice of brand for your next vehicle? (Please select all that apply).

Sample size: n= 707 [China]; 1,278 [Germany]; 957 [India]; 670 [Japan]; 893 [Republic of Korea]; 5,264 [Southeast Asia]; 1,881 [US]

The current inventory crisis may be training consumers to expect longer wait times for delivery of a new vehicle, potentially opening the door to a more “build-to-order” retail paradigm.

Acceptable length of time to wait for delivery of next vehicle



Q37: In your opinion, what is an acceptable length of time to wait for delivery of your next vehicle if it meant you got exactly what you wanted (i.e., features, color, etc.)?

Sample size: n= 707 [China]; 1,278 [Germany]; 957 [India]; 670 [Japan]; 893 [Republic of Korea]; 5,264 [Southeast Asia]; 1,881 [US]

When it comes to vehicle purchase experience expectations, surveyed consumers in most markets place the greatest emphasis on getting a good deal with transparent pricing.

Most important aspects of the purchase experience

Aspect of vehicle purchase experience	China	Germany	India	Japan	Rep. of Korea	Southeast Asia	US
Getting a good deal	33%	66%	40%	65%	52%	49%	57%
Transparent pricing	29%	37%	36%	47%	63%	46%	45%
Physical interaction with the vehicle (i.e., test drive)	34%	36%	40%	51%	26%	41%	42%
Low pressure experience	18%	27%	14%	12%	13%	14%	29%
Getting all my questions answered	29%	33%	30%	16%	12%	29%	28%
Convenient location	21%	25%	21%	19%	23%	20%	23%
To be offered different financing and usage-based models	26%	20%	26%	13%	22%	24%	17%
Making good use of my time	24%	11%	24%	14%	15%	16%	16%
Ability to complete all or some of the process online	25%	11%	29%	11%	13%	18%	16%
Building trust in the salesperson	26%	23%	17%	31%	18%	18%	14%
Having a resource for post-purchase needs	36%	11%	22%	19%	42%	26%	13%

Most commonly cited

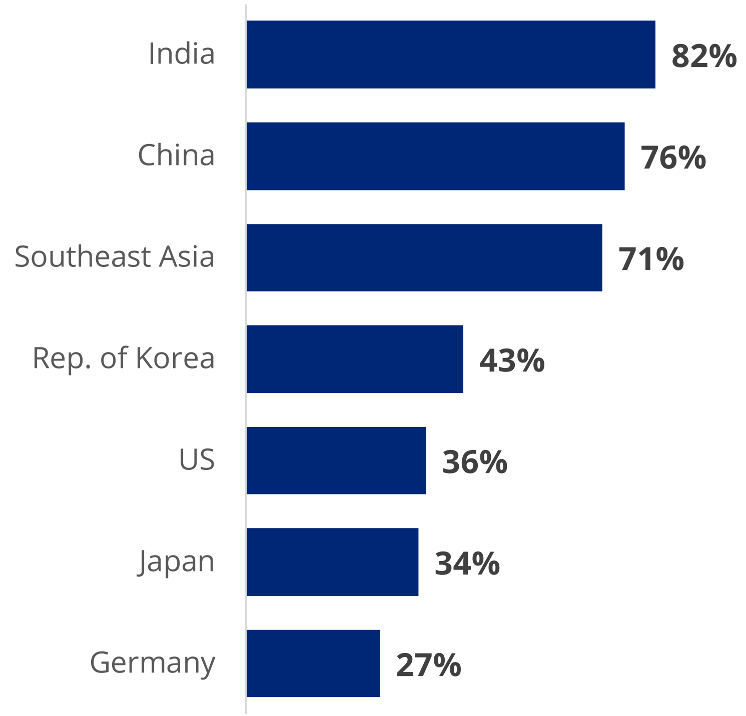
Note: Sum of the percentages exceed 100% as respondents can select multiple options.

Q59: When looking to acquire your next vehicle, what are the top three most important aspects of the purchase experience?

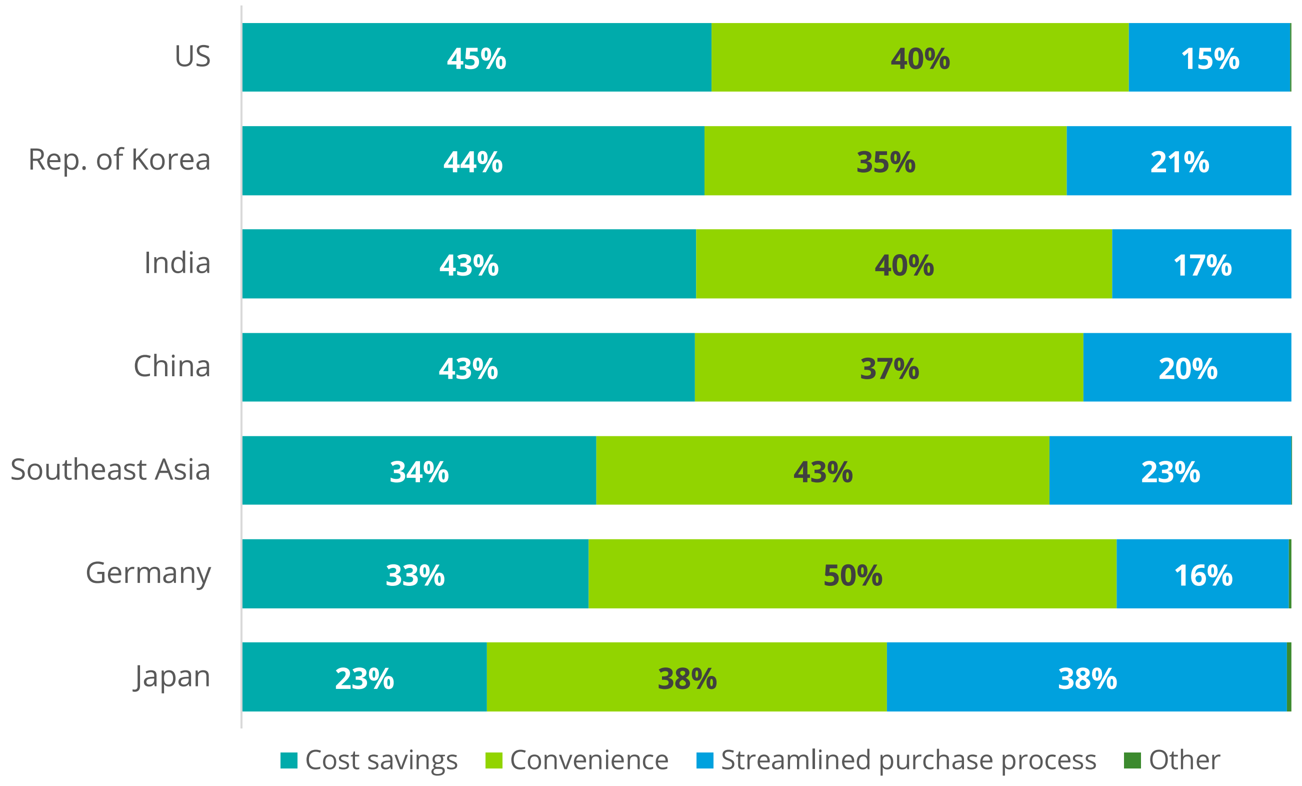
Sample size: n= 707 [China]; 1,278 [Germany]; 957 [India]; 670 [Japan]; 893 [Republic of Korea]; 5,264 [Southeast Asia]; 1,881 [US]

As OEMs look at every potential profit pool going forward, including offering their own insurance products, surveyed consumers in several markets are signaling a significant level of interest 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…



Q60: The next time you acquire a vehicle, how interested would you be in purchasing insurance directly from the vehicle manufacturer?; Q61: What do you expect the primary benefit of buying insurance directly from the manufacturer to be?

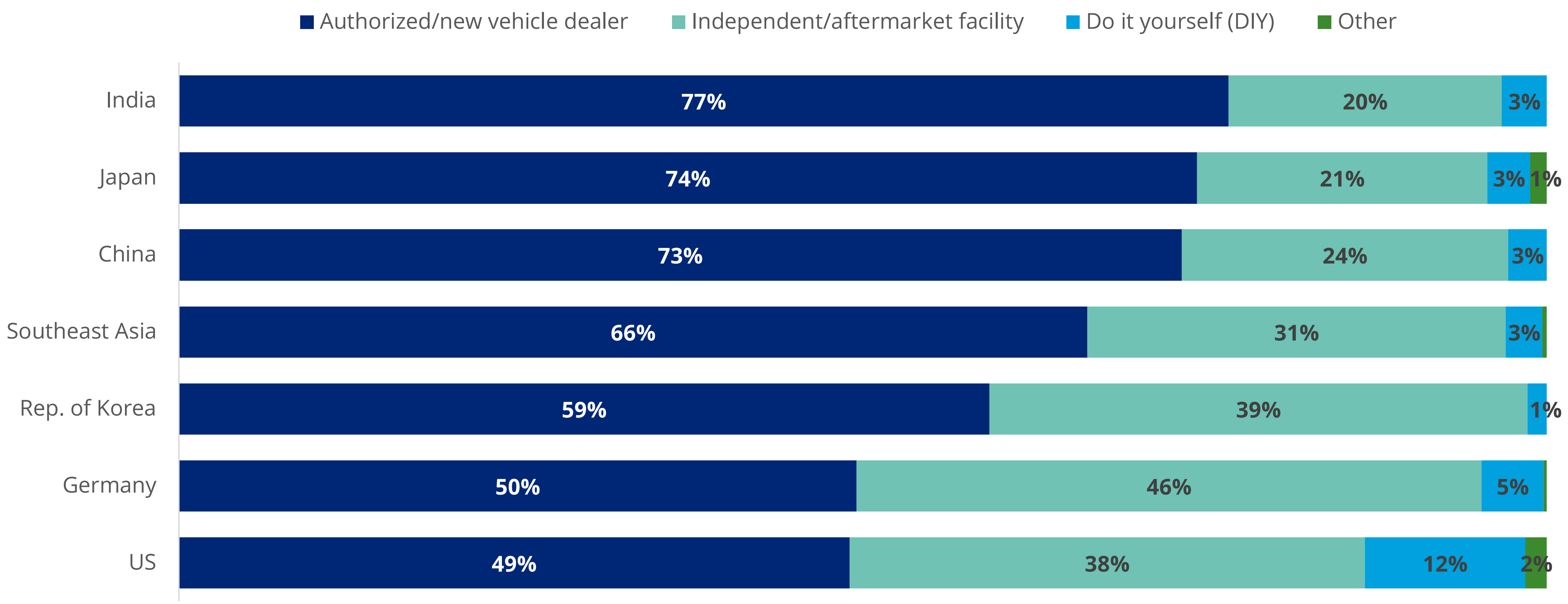
Sample size: n for Q60= 707 [China]; 1,278 [Germany]; 957 [India]; 670 [Japan]; 893 [Republic of Korea]; 5,264 [Southeast Asia]; 1,881 [US]; n for Q61= 535 [China]; 342 [Germany]; 783 [India]; 231 [Japan]; 388 [Republic of Korea]; 3,750 [Southeast Asia]; 684 [US]

3

Vehicle brand and service experience

A preference for new vehicle dealers as primary service providers is more pronounced in India, Japan, and China compared to Germany and the US, where aftermarket players claim a greater share of the vehicle service market.

Preferred vehicle service provider



Q24. Where do you normally service your vehicle?

Sample size: n= 813 [China]; 1,193 [Germany]; 847 [India]; 575 [Japan]; 773 [Republic of Korea]; 4,401 [Southeast Asia]; 1,789 [US]

Consumers surveyed service their vehicle at a dealership mainly due to a perception of work quality and trust they engender, while the primary reason for servicing at an aftermarket provider varies significantly by market.

Reasons for choosing vehicle service provider (by preferred provider)

	Dealer					Aftermarket				
	Cost	Trust	Convenience	Quality of work	Customer experience	Cost	Trust	Convenience	Quality of work	Customer experience
China	8%	21%	15%	**40%**	16%	20%	19%	18%	**27%**	16%
Germany	9%	30%	7%	**34%**	17%	27%	**29%**	8%	19%	14%
India	7%	28%	10%	**41%**	13%	13%	**28%**	20%	23%	16%
Japan	11%	**54%**	13%	10%	7%	**43%**	15%	25%	8%	7%
Republic of Korea	12%	**34%**	13%	**34%**	7%	24%	**29%**	13%	28%	6%
Southeast Asia	8%	**34%**	13%	**34%**	11%	23%	20%	16%	**32%**	8%
United States	12%	23%	11%	**36%**	14%	**34%**	19%	15%	23%	9%

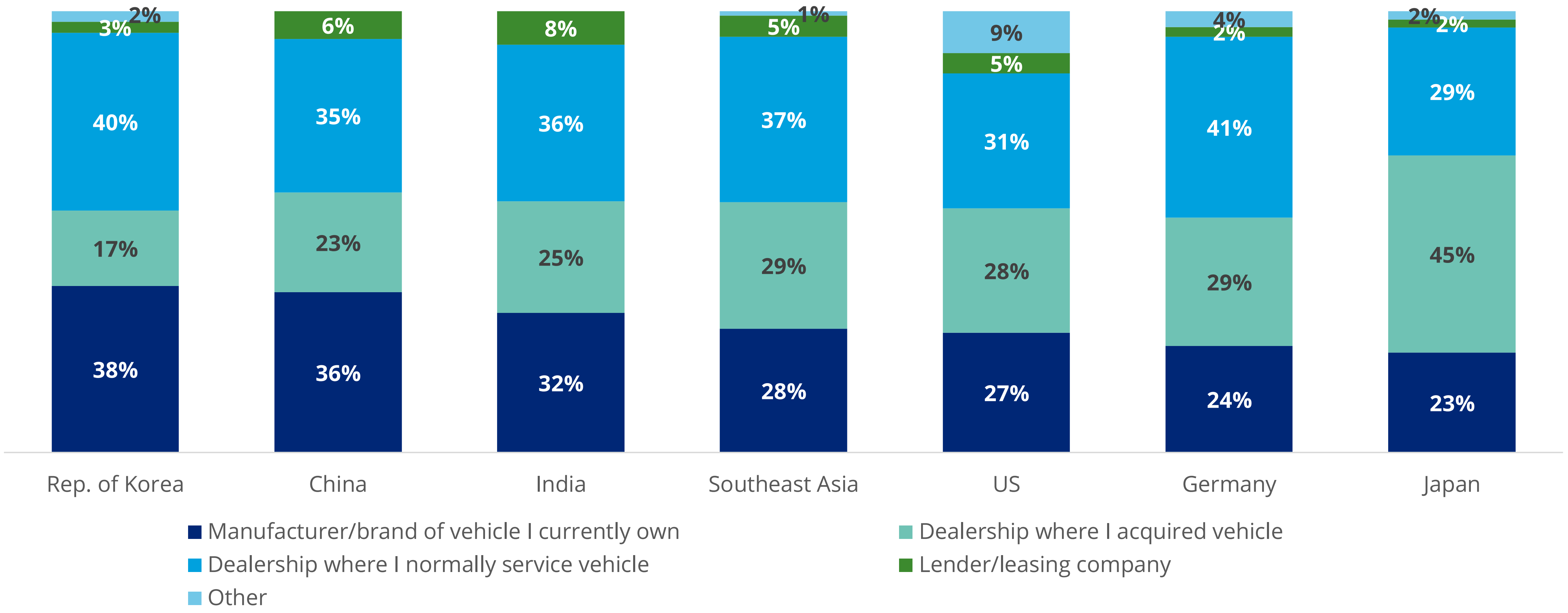
Primary reason for choice (shown in bold)

Q25. What is the most important reason for your preferred choice of vehicle service provider?

Sample size: n= 790 [China]; 1,136 [Germany]; 819 [India]; 550 [Japan]; 762 [Republic of Korea]; 4,268 [Southeast Asia]; 1,551 [US]

Consumers across markets most trust the dealer where they originally acquired or normally service their vehicle, signaling the important role dealers play in maintaining customer relationships.

Consumers surveyed have the most trusted relationship with…



Q27: With whom do you have the most trusted relationship?

Sample size: n= 813 [China]; 1,193 [Germany]; 847 [India]; 575 [Japan]; 773 [Republic of Korea]; 4,401 [Southeast Asia]; 1,789 [US]

Surveyed consumers, across markets, expect a brand app to help them with vehicle's features, schedule service appointments, and making payments; however, interest in using brand apps for charging and public parking is significantly lower.

Important features for a vehicle brand app	China	Germany	India	Japan	Rep. of Korea	Southeast Asia	US
Learn about your vehicle's features	36%	37%	42%	46%	53%	52%	36%
Schedule service	37%	32%	42%	24%	38%	45%	35%
Make payments	26%	15%	48%	28%	20%	42%	29%
Track service appointments (i.e., cost, timing)	35%	38%	44%	26%	33%	46%	25%
Lock / unlock vehicle	15%	14%	26%	20%	24%	31%	24%
Track your vehicle's location	23%	20%	35%	14%	19%	35%	20%
Locate a dealer	22%	17%	32%	11%	25%	26%	20%
Chat with a live agent	16%	8%	37%	9%	20%	30%	19%
Remote start	19%	6%	23%	9%	21%	23%	19%
Build and price your next vehicle	23%	15%	26%	15%	17%	22%	17%
Purchase accessories	25%	15%	36%	10%	11%	34%	14%
View and add features that enhance my vehicle	21%	13%	36%	14%	33%	32%	14%
View and add battery life	13%	16%	28%	17%	28%	29%	12%
View / redeem loyalty points	15%	7%	22%	7%	16%	21%	10%
Search and pay for public vehicle charging access	6%	11%	20%	8%	12%	19%	7%
Search and pay for public parking	4%	11%	9%	10%	10%	14%	5%

Most commonly cited

Q28. What are the most important features of a vehicle brand app? (Please select all that apply).

Sample size: n= 813 [China]; 1,193 [Germany]; 847 [India]; 575 [Japan]; 773 [Republic of Korea]; 4,401 [Southeast Asia]; 1,789 [US]

4

Connectivity

Surveyed consumers in developing markets see greater benefits in connected vehicles and are ready to share PII* while consumers in Germany and the US have more limited interest.

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

Connected vehicle features	China	Germany	India	Japan	Rep. of Korea	Southeast Asia	US
Maintenance updates and vehicle health reporting / alerts	80%	56%	**84%**	62%	66%	**81%**	**60%**
Updates regarding traffic congestion and suggested alternate routes	78%	**58%**	83%	**66%**	**75%**	**81%**	58%
Updates to improve road safety and prevent potential collisions	80%	53%	**84%**	**66%**	72%	**81%**	57%
Suggestions regarding safer routes (i.e., avoid unpaved roads)	**82%**	43%	85%	63%	68%	78%	54%
Maintenance cost forecasts based on your driving habits	81%	47%	81%	54%	61%	78%	53%
Customized suggestions regarding ways to minimize service expenses	80%	46%	81%	62%	74%	77%	50%
Over-the-air vehicle software updates that correct or improve your driving experience	76%	37%	80%	50%	62%	74%	49%
Access to nearby parking (i.e., availability, booking, and payment)	78%	51%	82%	60%	68%	76%	48%
Receiving a discount for access to a Wi-Fi connection in your vehicle	77%	38%	78%	57%	60%	71%	47%
Customized/optimized vehicle insurance plan (e.g., "pay how you drive" plans)	76%	46%	79%	47%	65%	72%	46%
Special offers regarding non-automotive products and services related to your journey or destination	76%	32%	79%	49%	55%	69%	40%

Most commonly cited (highlighted)

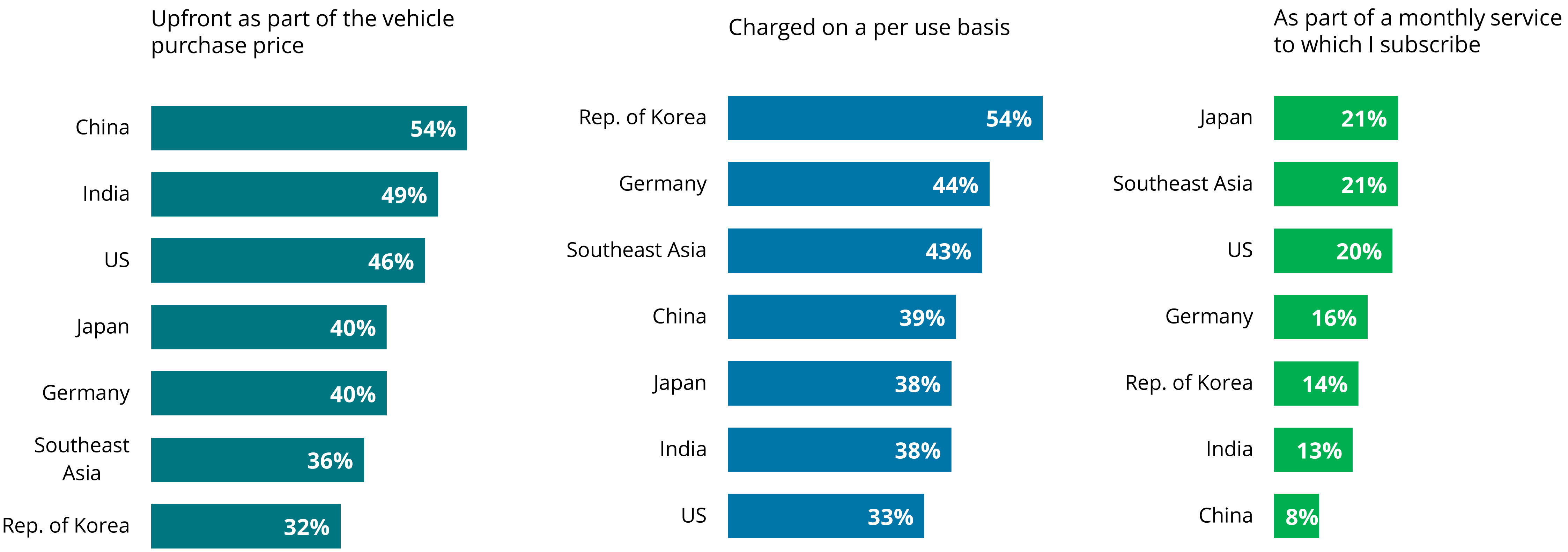
*Personally identifiable information.

Q55: 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 for Q55= 707 [China]; 1,278 [Germany]; 957 [India]; 670 [Japan]; 893 [Republic of Korea]; 5,264 [Southeast Asia]; 1,881 [US]

Mobility providers looking to offer subscription services for connected vehicle technologies may find it challenging as most surveyed consumers would rather pay for these features either upfront as part of the vehicle purchase price or on a per use basis.

Consumers' preferred ways to pay for additional connectivity technologies



Q58: How would you prefer to pay for additional connectivity technologies in your vehicle?

Sample size: n = 707 [China]; 1,278 [Germany]; 957 [India]; 670 [Japan]; 893 [Republic of Korea]; 5,264 [Southeast Asia]; 1,881 [US]

About the study

About the study

The 2023 study includes more than 26,000 consumer responses from 24 countries around the world.

North America	Sample
Canada (CA)	1,011
Mexico (MX)	1,008
United States (US)	2,011

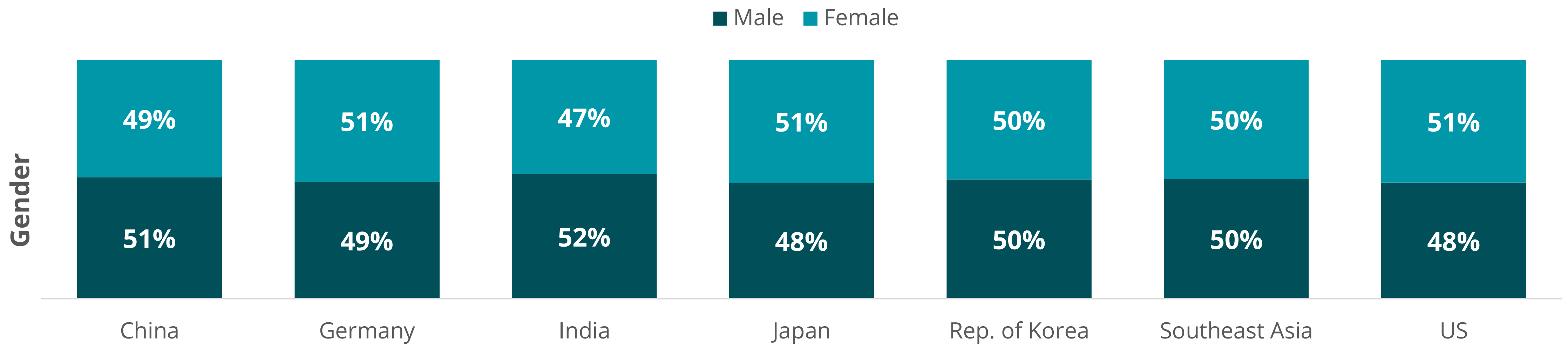
EMEA	Sample
Austria (AT)	1,004
Belgium (BE)	1,019
France (FR)	1,006
Germany (DE)	1,506
Italy (IT)	1,002
Poland (PL)	1,002
South Africa (ZA)	1,014
Spain (ES)	1,009
Turkey (TR)	1,006
United Kingdom (GB)	1,514

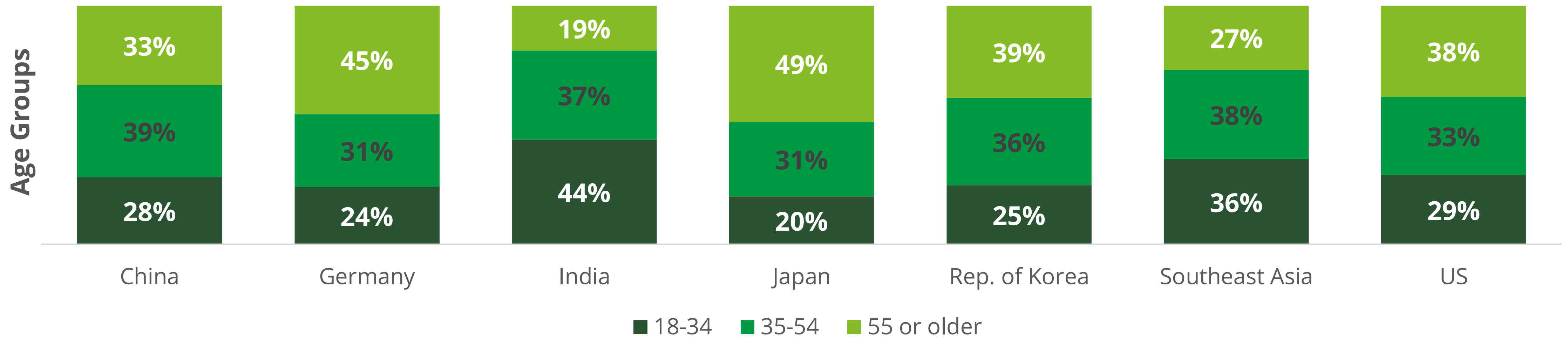
Asia-Pacific	Sample
Australia (AU)	1,005
China (CN)	1,012
India (IN)	1,003
Indonesia (ID)	1,003
Japan (JP)	1,017
Malaysia (MY)	1,006
Philippines (PH)	1,008
Republic of Korea (KR)	1,011
Singapore (SG)	1,003
Thailand (TH)	1,009
Vietnam (VN)	1,019

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 India, Japan, and US is 1%; Southeast Asia region comprises Indonesia, Malaysia, Philippines, Singapore, Thailand, and Vietnam markets.

Sample size: n= 1,012 [China]; 1,506 [Germany]; 1,003 [India]; 1,017 [Japan]; 1,011 [Republic of Korea]; 6,048 [Southeast Asia]; 2,011 [US]

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