Navigating the customer journey
Italy perspectives from Deloitte’s Global Automotive Consumer Study
Key findings

How do consumers feel about autonomous vehicles?
- Consumers are more positive about fully self-driving vehicles
- All generations are fairly confident about AV technology
- Established track record is more important for self-driving vehicles
- Speaking of brand trust, consumers put their faith in OEMs

How do consumers feel about electrified vehicles?
- Fewer consumers want traditional engines going forward
- Lack of charging infrastructure is a significant concern for all battery-powered electric vehicles (BEVs)
- Lower emissions and tax incentives attracts consumers to BEVs

How do consumers research a vehicle purchase?
- Most consumers start researching 3 months before purchase
- There is little difference between men and women on the researching front
- Half of consumers spend 10 hours or less researching vehicles
- Dealer visits help strengthen trust with the dealer salesperson
- Dealer salespeople have significant impact on purchase decision
- The majority of consumers do not use third-party pricing services
- Younger generations are more comfortable with pricing services

In-dealer consumer experience
- 90% of consumers visited their selling dealer more than once
- Customer experience is clearly a key factor in choosing a dealer
- Consumers take their time before finalizing the vehicle purchase
- Salespeople and printed brochures are considered the most useful
- Digital information is more important for younger customers
- Consumers are most concerned with getting a good deal
- Consumers really do not like a lot of paperwork in the process
- Consumers set upper limits on the amount of time for key processes
- The majority of consumers like to inspect the vehicle before buying
- Interaction with a real person is the most important aspect
- Service experience hinges on customer time and convenience
- The majority of digital journey is merely meeting expectations
- And it’s the same story with digital servicing touchpoints

Communication from dealers and manufacturers
- Both OEMs and dealers could be missing a big opportunity
- Reasons for contact vary between OEMs and dealers
- Consumers are more satisfied with communication from dealers
- Leading to consumers preferring communication from dealers
Key findings

Are consumers ready to leave the dealer behind?
- Consumers still expect F&I processes to be done at the dealer
- Consumers are only somewhat interested to buy direct from OEMs
- Interest is even lower in buying from an online retail website

Testing some forward-looking tools and scenarios
- Consumers want a hassle free service experience
- Consumers are most interested in maintenance updates
How do consumers feel about autonomous vehicles?
Consumers are more positive about fully self-driving vehicles
Consumer perception about the safety of full self-driving cars has improved significantly on a year-over-year basis

Consumer opinion on fully self-driving vehicles

- If price and/or safety were not an issue, I am willing to use a vehicle that could drive itself: 63% (2018) vs. 51% (2017)
- Travelling in a fully self-driving car will be a positive experience: 61% (2018) vs. 52% (2017)
- A fully self-driving car will free up my time so I can focus on other activities: 55% (2018) vs. 51% (2017)
- Fully self-driving cars will not be safe: 30% (2018) vs. 66% (2017)

Note: Percentage of respondents who strongly agreed or agreed have been added together
Q1: To what extent do you agree or disagree with the following statements?
Sample size: 1,236 [MOD 2], n = 1,109 [MOD 1]
All generations are fairly confident about AV technology
Survey evidence suggests very little gender effect when it comes to opinions regarding autonomous vehicles

Consumer opinion on fully self-driving vehicles

<table>
<thead>
<tr>
<th>Statement</th>
<th>Pre/Boomers</th>
<th>Gen X</th>
<th>Gen Y/Z</th>
</tr>
</thead>
<tbody>
<tr>
<td>If price and/or safety were not an issue, I am willing to use a vehicle that could drive itself</td>
<td>60%</td>
<td>65%</td>
<td>66%</td>
</tr>
<tr>
<td>Travelling in a fully self-driving car will be a positive experience</td>
<td>57%</td>
<td>65%</td>
<td>62%</td>
</tr>
<tr>
<td>A fully self-driving car will free up my time so I can focus on other activities</td>
<td>46%</td>
<td>62%</td>
<td>61%</td>
</tr>
<tr>
<td>Fully self-driving cars will not be safe</td>
<td>32%</td>
<td>31%</td>
<td>29%</td>
</tr>
</tbody>
</table>

Note: Percentage of respondents who strongly agreed or agreed have been added together
Q1: To what extent do you agree or disagree with the following statements?
Sample sizes – [Pre/Boomers, N= 485; Gen X, N= 311; Gen Y/Z, N= 418]
Established track record more important for self-driving vehicles
Three out of five consumers would also feel better about AV technology if offered by a trusted brand and if there were government regulations

Factors making consumers feel better about riding in a fully self-driving vehicle

- An established track record of self-driving cars being used on the streets safely: 69% (2018), 51% (2017)
- Vehicle is offered by a brand you trust: 65% (2018), 43% (2017)

Note: Percentage of respondents who strongly agreed or agreed have been added together.
Q2: Would the following factors make you more or less likely to ride in a self-driving car?
Sample size: n= 1,234 [MOD 2], n= 1,133 [MOD 1]
Speaking of brand trust, consumers put their faith in OEMs
However, 49% of consumers would most trust someone else to bring AV technology to market, signaling an opportunity for brand partnerships

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

- Traditional car manufacturer: 51% (2018), 44% (2017)
- Existing technology company: 26% (2018), 23% (2017)
- Other: 2% (2018), 4% (2017)

Q3: Would the following factors make you more or less likely to ride in a self-driving car?
Sample size: n= 1,260 [MOD 2], n= 1,249 [MOD 1]
How do consumers feel about electrified vehicles?
Fewer consumers want traditional engines going forward
Evidence suggests consumers may be starting to shift their thinking even more towards alternative powertrain technology

Consumers’ expectations with respect to engine type in their next vehicle (2018)

<table>
<thead>
<tr>
<th>Engine Type</th>
<th>Preference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gasoline/Diesel (ICE)</td>
<td>49%</td>
</tr>
<tr>
<td>Hybrid electric (HEV)</td>
<td>36%</td>
</tr>
<tr>
<td>All battery-powered electric (BEV)</td>
<td>7%</td>
</tr>
<tr>
<td>Other</td>
<td>8%</td>
</tr>
</tbody>
</table>

2017 Data:
- Gas + Diesel: 53%
- Hybrid: 32%
- Other Alt: 15%

Note: ‘Other’ category includes ethanol, compressed natural gas, and hydrogen fuel cell.
Q38. What type of engine would you prefer in your next vehicle?
Sample size: n=1,048
Lack of charging infrastructure is a significant concern for BEVs
44% of consumers view lack of charging infrastructure as their biggest concern for BEVs

Greatest concern regarding all battery-powered electric vehicles

- Lack of electric vehicle charging infrastructure: 44%
- Cost/price premium: 19%
- Time required to charge: 18%
- Safety concerns with battery technology: 7%
- Driving range: 4%
- An all battery electric powertrain is not offered in the type of vehicle I want (e.g., SUV, truck): 4%
- The brand I prefer doesn't offer electrified vehicles: 3%
- Other: 1%

Q39. What is your greatest concern regarding all battery-powered electric vehicles? Sample size: n=1,048
Lower emissions and tax incentives attracts consumers to BEVs
One third of the consumers are willing to consider these vehicles for lower emissions and tax incentives

Reasons to consider an all battery-powered electric vehicles

- Lower emissions/environmental responsibility: 33%
- Rebates/tax incentives: 30%
- Lower vehicle operating costs (e.g., fuel, service): 24%
- I would not consider it for any reason: 7%
- Social status/keeping up with latest technology: 5%
- Other: 1%

Q40. What would be the main reason for you to consider an all battery-powered electric vehicle?
Sample size: n=1,048
How do consumers research a vehicle purchase?
Most consumers start researching 3 months before purchase
Vehicle brands have reasonable amount of time to connect with consumers and influence a vehicle purchase decision

Duration of research before deciding to acquire a vehicle

- Less than a month: 20%
- 1 month to less than 3 months: 38%
- 3 months to less than 6 months: 29%
- 6 months to less than 9 months: 9%
- 9 months to 12 months: 3%
- More than 12 months: 1%

Q10. How long before you made the decision to acquire did you start researching your current vehicle?
Sample size: n=908
Little difference between men and women on researching front
Both genders take about the same length of time in terms of researching a vehicle before the purchase event

Duration doing research before deciding to acquire current vehicle (men vs. women)

<table>
<thead>
<tr>
<th>Duration</th>
<th>Men</th>
<th>Women</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than a month</td>
<td>19%</td>
<td>21%</td>
</tr>
<tr>
<td>1 month to less than 3 months</td>
<td>39%</td>
<td>36%</td>
</tr>
<tr>
<td>3 months to less than 6 months</td>
<td>29%</td>
<td>29%</td>
</tr>
<tr>
<td>6 months to less than 9 months</td>
<td>9%</td>
<td>9%</td>
</tr>
<tr>
<td>9 months to 12 months</td>
<td>2%</td>
<td>4%</td>
</tr>
<tr>
<td>More than 12 months</td>
<td>2%</td>
<td>2%</td>
</tr>
</tbody>
</table>

Q10. How long before you made the decision to acquire did you start researching your current vehicle?
Sample size: M=475; W=431
Half of consumers spend 10 hours or less researching vehicles
However, another third of consumers spent 10-20 hours researching their current vehicle before deciding to buy

Time spent by consumers researching vehicles

<table>
<thead>
<tr>
<th>Time</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than 4 hours</td>
<td>23%</td>
</tr>
<tr>
<td>4 to less than 10 hours</td>
<td>26%</td>
</tr>
<tr>
<td>10 to less than 15 hours</td>
<td>21%</td>
</tr>
<tr>
<td>15 to less than 20 hours</td>
<td>12%</td>
</tr>
<tr>
<td>20 to less than 25 hours</td>
<td>7%</td>
</tr>
<tr>
<td>25 hours or longer</td>
<td>11%</td>
</tr>
</tbody>
</table>

Q13. When considering the acquisition of your current vehicle, how many hours in total would you estimate you spent researching possible vehicles (e.g., through the Internet, consumer publications, automotive magazines, etc.)?
Sample size: n= 908
Dealer visits help strengthen trust with the dealer salesperson
After the dealer visit, consumer reliance on dealer sales staff increases, with all other sources being used less often

Sources of information that were used at least once or more pre and post dealer visit

Q11. Before you made the decision to acquire, how many times do you think you accessed each of the following information sources when shopping for your current vehicle?
Q20. After you started visiting dealerships, how many times do you think you accessed each of the following information sources to aid in the shopping process for your current vehicle?
Sample size: n=908; 783
Dealer salespeople have significant impact on purchase decision
Information given by dealership salespeople followed by friends and family have a major influence on the purchase decision of consumers

Impact of information sources on which vehicle is bought

<table>
<thead>
<tr>
<th>Source</th>
<th>Little/No impact</th>
<th>Some impact</th>
<th>Significant impact</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salespeople at the dealership</td>
<td>30%</td>
<td>23%</td>
<td>44%</td>
<td></td>
</tr>
<tr>
<td>Family, friends, co-workers</td>
<td>40%</td>
<td>23%</td>
<td>36%</td>
<td></td>
</tr>
<tr>
<td>Manufacturer websites (e.g., ford.com)</td>
<td>41%</td>
<td>23%</td>
<td>32%</td>
<td></td>
</tr>
<tr>
<td>Other (media reviews, magazines)</td>
<td>49%</td>
<td>19%</td>
<td>26%</td>
<td></td>
</tr>
<tr>
<td>Dealer websites (view inventory, find dealer hours/location)</td>
<td>47%</td>
<td>22%</td>
<td>26%</td>
<td></td>
</tr>
<tr>
<td>Safety-related websites (e.g., Consumer Reports, government crash test ratings)</td>
<td>57%</td>
<td>16%</td>
<td>20%</td>
<td></td>
</tr>
<tr>
<td>Retail websites (e.g., eBay Motors, Autotrader, Amazon)</td>
<td>63%</td>
<td>15%</td>
<td>17%</td>
<td></td>
</tr>
<tr>
<td>Financial provider websites</td>
<td>66%</td>
<td>13%</td>
<td>14%</td>
<td></td>
</tr>
<tr>
<td>Social media (e.g., Facebook)</td>
<td>68%</td>
<td>12%</td>
<td>13%</td>
<td></td>
</tr>
<tr>
<td>Third-party websites (e.g., Edmunds, Autohome, WhatCar)</td>
<td>68%</td>
<td>12%</td>
<td>13%</td>
<td></td>
</tr>
</tbody>
</table>

Q12. When considering purchasing or leasing your current vehicle, how much of an impact did information from each of the following sources have on your ultimate decision of which vehicle you chose?
Sample size: n=908
Majority of consumers do not use third-party pricing services
Of those who did use them, 41% found the service either very or extremely useful

Q14. Did you use a third-party, vehicle pricing support service (e.g., TrueCar, Edmunds, BitAuto, CarTrade, etc.) in the process of acquiring your current vehicle?
Sample size: n=908

Q15. How useful did you find the vehicle pricing support you received?
Sample size: n=94
Younger generations are more comfortable with pricing services

However, more than half of the consumers across generations did not find the services useful.

Percentage of consumers using third-party, vehicle pricing support services to purchase vehicle

<table>
<thead>
<tr>
<th>Group</th>
<th>No</th>
<th>Yes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre/Boomers</td>
<td>96%</td>
<td>4%</td>
</tr>
<tr>
<td>Gen X</td>
<td>87%</td>
<td>13%</td>
</tr>
<tr>
<td>Gen Y/Z</td>
<td>83%</td>
<td>17%</td>
</tr>
</tbody>
</table>

Percentage of consumers who found third-party pricing service extremely/very useful

<table>
<thead>
<tr>
<th>Group</th>
<th>31%</th>
<th>42%</th>
<th>44%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre/Boomers</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gen X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gen Y/Z</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Q14. Did you use a third-party, vehicle pricing support service (e.g., TrueCar, Edmunds, BitAuto, CarTrade, etc.) in the process of acquiring your current vehicle?

Sample sizes - [Pre/Boomers, N= 371; Gen X, N= 234; Gen Y/Z, N= 303]
In-dealer consumer experience
90% of consumers visited their selling dealer more than once
A third of consumers do not visit any other dealers apart from the one where they eventually purchased their current vehicle

Dealer where I acquired my current vehicle  Other dealers that sell my current vehicle  Other dealers that sell other brands of comparable vehicles

Number of visits

<table>
<thead>
<tr>
<th>Number of visits</th>
<th>Dealer where I acquired my current vehicle</th>
<th>Other dealers that sell my current vehicle</th>
<th>Other dealers that sell other brands of comparable vehicles</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>1%</td>
<td>38%</td>
<td>32%</td>
</tr>
<tr>
<td>1</td>
<td>9%</td>
<td>21%</td>
<td>17%</td>
</tr>
<tr>
<td>2</td>
<td>37%</td>
<td>20%</td>
<td>21%</td>
</tr>
<tr>
<td>3</td>
<td>35%</td>
<td>13%</td>
<td>17%</td>
</tr>
<tr>
<td>4</td>
<td>11%</td>
<td>5%</td>
<td>7%</td>
</tr>
<tr>
<td>5 or more</td>
<td>7%</td>
<td>3%</td>
<td>6%</td>
</tr>
</tbody>
</table>

Q17. How many dealer visits did you conduct during the buying process for your current vehicle?
Sample size: n=783
Customer experience is clearly a key factor in choosing a dealer
63% of the consumers rate customer experience as an important factor in choosing where to buy a vehicle

How important is customer experience in choosing which dealer to buy from?

Q18. Thinking about the dealer where you acquired your current vehicle, how important was the customer experience in making the choice to buy there?
Sample size: n=783
Consumers take their time before finalizing the vehicle purchase
In fact, 45% of consumers acquired their current vehicle after more than two weeks of visiting dealerships

Time to vehicle delivery

Q19. Once you started visiting dealerships, how long was it before you acquired your current vehicle?
Sample size: n=783
Sales people and printed brochures considered most useful
More than two-thirds of consumers still find printed brochures and spec sheets very useful in gathering information at the dealership

Presence of channels at a dealership

<table>
<thead>
<tr>
<th>Channel</th>
<th>Not at all interested/Not very interested</th>
<th>Neutral</th>
<th>Somewhat/Very interested</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conversation with a salesperson</td>
<td>3%</td>
<td>9%</td>
<td>88%</td>
<td>0%</td>
</tr>
<tr>
<td>Printed brochures and specification sheets</td>
<td>7%</td>
<td>19%</td>
<td>71%</td>
<td>3%</td>
</tr>
<tr>
<td>Your own mobile device</td>
<td>11%</td>
<td>26%</td>
<td>39%</td>
<td>24%</td>
</tr>
<tr>
<td>Interactive computer kiosks</td>
<td>11%</td>
<td>29%</td>
<td>30%</td>
<td>30%</td>
</tr>
<tr>
<td>A tablet device provided by the dealership</td>
<td>13%</td>
<td>25%</td>
<td>30%</td>
<td>32%</td>
</tr>
<tr>
<td>Augmented/virtual reality headset provided by the dealership</td>
<td>12%</td>
<td>26%</td>
<td>28%</td>
<td>34%</td>
</tr>
</tbody>
</table>

Q23. How useful are each of the following channels in helping you gather information while at a dealership?
Sample size: n=722
Digital information is more important for younger customers
Traditional information sources more useful among older consumers while digital becomes more important for Gen X and Y/Z

Usefulness of information channels at a dealership (% somewhat/very useful)

Q23. How useful are each of the following channels in helping you gather information while at a dealership? Sample size: n=783; Pre/Boomers: n=321, Gen X: n=205, Gen Y/Z: n=257

- Conversation with a salesperson
  - Pre/Boomers: 80%
  - Gen X: 89%
  - Gen Y/Z: 94%
  - “Traditional”
  - “Digital”

- Printed brochures and specification sheets
  - Pre/Boomers: 67%
  - Gen X: 71%
  - Gen Y/Z: 75%

- Your own mobile device
  - Pre/Boomers: 46%
  - Gen X: 45%
  - Gen Y/Z: 31%

- Interactive computer kiosks
  - Pre/Boomers: 40%
  - Gen X: 34%
  - Gen Y/Z: 20%
Consumers are most concerned with getting a good deal
The power of the sales associate to effectively build a relationship with the customer cannot be underestimated

The most enjoyable aspects of the dealer experience are...

- Got a good deal/price: 27%
- Friendliness/relationship with sales associate: 19%
- All my questions were answered: 18%
- Quick/efficient process: 8%
- The test drive: 9%
- Convenient location: 6%
- I learned about extra features: 3%
- Did not have to negotiate: 3%
- Technology that made the experience more efficient/easier: 3%
- Technology that made the experience more fun (e.g., virtual reality): 7%
- Follow-up post-purchase: 7%
- Dealership amenities (e.g., kid's play room, restaurants/coffee shop, cocktail bar): 4%
- Other: 1%

Q24. What are the three aspects of the dealer experience you enjoyed most when you acquired your current vehicle?
Sample size: n=783
Consumers really do not like a lot of paperwork in the process
Consumers also place a great deal of value on the dealership location and the dealer having the right vehicle on hand

The most disliked aspects of the dealer experience are...

- Too much paperwork: 48%
- Location: 33%
- Lack of availability/stock: 29%
- Poor technology/digital tools: 29%
- Other: 26%
- Overall purchase experience took too long: 24%
- Poor demonstration of in-vehicle features/technology: 23%
- Poor dealer responsiveness to emails/texts/phone calls: 21%
- Pricing issues/haggling: 21%
- Poor showroom/dealership condition: 17%
- Dealer did not have access to information I had already provided: 16%
- Pushy sales person: 12%

Q25. What are the top three aspects of the dealer experience you disliked most when you acquired your current vehicle?
Sample size: n=783
Consumers set upper limits on amount of time for key processes
Consumers expect minimum time for processing financing and test driving the vehicle

Longest amount of time for specific sales processes

<table>
<thead>
<tr>
<th>Process</th>
<th>&lt;20 mins</th>
<th>21-45 mins</th>
<th>&gt;45 mins</th>
</tr>
</thead>
<tbody>
<tr>
<td>Process financing after purchasing or leasing</td>
<td>42%</td>
<td>46%</td>
<td>12%</td>
</tr>
<tr>
<td>Wait to test drive vehicle (before purchasing or leasing)</td>
<td>40%</td>
<td>49%</td>
<td>11%</td>
</tr>
<tr>
<td>Process paperwork and registration associated with purchase and final sale</td>
<td>37%</td>
<td>50%</td>
<td>13%</td>
</tr>
<tr>
<td>Get information from dealership on vehicles to purchase or lease</td>
<td>30%</td>
<td>55%</td>
<td>15%</td>
</tr>
<tr>
<td>Vehicle delivery</td>
<td>27%</td>
<td>44%</td>
<td>29%</td>
</tr>
<tr>
<td>Perform simple service (e.g. oil change, tire rotation)</td>
<td>17%</td>
<td>42%</td>
<td>41%</td>
</tr>
</tbody>
</table>

Q21. Please indicate the longest amount of time you would find acceptable to **spend at a dealership** on each of the following steps
Sample size: n=783
**Majority of consumers like to inspect the vehicle before buying**
More than 8 out of 10 consumers like to see the vehicle and interact with people before they buy it

**How do people feel about their experiences at a dealership?**

<table>
<thead>
<tr>
<th>Statement</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>I need to see the vehicle before I buy it (e.g., color)</td>
<td>84%</td>
</tr>
<tr>
<td>I like to interact with real people</td>
<td>84%</td>
</tr>
<tr>
<td>I want to negotiate in person to get the best deal</td>
<td>77%</td>
</tr>
<tr>
<td>I have to test drive the vehicle to make sure it's right for me</td>
<td>65%</td>
</tr>
<tr>
<td>I want to build a relationship with the dealer for service</td>
<td>64%</td>
</tr>
<tr>
<td>I would pay to have a dealer pick up my vehicle for service and drop off a loaner</td>
<td>47%</td>
</tr>
<tr>
<td>I would prefer not to have to go to the dealer for anything</td>
<td>33%</td>
</tr>
<tr>
<td>I would prefer to purchase a vehicle without negotiating with a salesperson</td>
<td>32%</td>
</tr>
<tr>
<td>I spend more time at the dealer because of the amenities it offers</td>
<td>30%</td>
</tr>
<tr>
<td>I would prefer to design, build, and negotiate price with a dealer over the Internet to purchase my next vehicle, without having to visit the dealership in person</td>
<td>21%</td>
</tr>
</tbody>
</table>

Note: Percentage of respondents who strongly agreed or agreed have been added together
Q26. Thinking about your experience with dealerships, to what extent do you agree/disagree with the following statements?
Sample size: n=783
Interaction with a real person the most important aspect
Minimal paperwork, innovative technology for efficient purchase process, and getting pricing information are also important aspects

Consumer opinions on important aspects of a vehicle buying process

<table>
<thead>
<tr>
<th>Aspect</th>
<th>Not at all important/not very important</th>
<th>Neutral</th>
<th>Somewhat important/very important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interacting with a real person to ask questions</td>
<td>5%</td>
<td>16%</td>
<td>79%</td>
</tr>
<tr>
<td>Minimal paperwork</td>
<td>7%</td>
<td>26%</td>
<td>67%</td>
</tr>
<tr>
<td>Innovative technology to make the purchase process more efficient</td>
<td>11%</td>
<td>26%</td>
<td>63%</td>
</tr>
<tr>
<td>Getting pricing information and/or locking-in a vehicle price online</td>
<td>12%</td>
<td>26%</td>
<td>62%</td>
</tr>
<tr>
<td>Building rapport with the dealer</td>
<td>13%</td>
<td>31%</td>
<td>56%</td>
</tr>
<tr>
<td>Extended duration test drives (e.g., 24 hours or more)</td>
<td>13%</td>
<td>32%</td>
<td>55%</td>
</tr>
<tr>
<td>Getting pre-approved for financing before shopping</td>
<td>16%</td>
<td>29%</td>
<td>55%</td>
</tr>
<tr>
<td>Ride-and-drive events where you can test drive several vehicles at one time</td>
<td>16%</td>
<td>31%</td>
<td>53%</td>
</tr>
<tr>
<td>Innovative technology to make the purchase more engaging/fun (e.g., virtual reality)</td>
<td>19%</td>
<td>34%</td>
<td>47%</td>
</tr>
<tr>
<td>Minimal contact with the dealer</td>
<td>22%</td>
<td>36%</td>
<td>42%</td>
</tr>
<tr>
<td>Access to product specialists (e.g., Apple “genius” concept)</td>
<td>22%</td>
<td>41%</td>
<td>37%</td>
</tr>
</tbody>
</table>

Q45. How important are each of the following items related to the vehicle buying process?
Sample size: n=900
Service experience hinges on customer time and convenience
More than 70% of the consumers consider availability of loaner vehicle and rapid check-in/check-out the most important service aspects

Consumer opinions on important aspects of a vehicle service process

- Access to loaner vehicles during service: 6% not at all important/not very important, 16% neutral, 78% somewhat important/very important
- Rapid check-in/check-out for service: 4% not at all important/not very important, 19% neutral, 77% somewhat important/very important
- Ongoing support between service occasions: 5% not at all important/not very important, 26% neutral, 69% somewhat important/very important
- Real-time updates during service: 7% not at all important/not very important, 24% neutral, 69% somewhat important/very important
- Concierge service to pick up/drop off vehicle from home/office for service: 8% not at all important/not very important, 24% neutral, 68% somewhat important/very important
- Amenities/experiences (e.g., kid’s play room, restaurant/coffee shop): 44% not at all important/not very important, 32% neutral, 24% somewhat important/very important

Q46. How important are each of the following items related to the vehicle service process?
Sample size: n=1,048
# Majority of digital journey is merely meeting expectations

Percentage of digital touchpoints that are below expectations is quite low, but no one is really hitting a homerun either.

## Evaluation of digital servicing touchpoints

<table>
<thead>
<tr>
<th>Touchpoint</th>
<th>Below expectations</th>
<th>Met expectations</th>
<th>Above expectations</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manufacturer/brand website (e.g., research models, view photos/videos)</td>
<td>5%</td>
<td>62%</td>
<td>9%</td>
<td>24%</td>
</tr>
<tr>
<td>Vehicle comparison tool</td>
<td>8%</td>
<td>51%</td>
<td>10%</td>
<td>31%</td>
</tr>
<tr>
<td>Dealer communications (email/text/chat)</td>
<td>10%</td>
<td>51%</td>
<td>14%</td>
<td>25%</td>
</tr>
<tr>
<td>Dealer websites (e.g., search inventory, book a test drive)</td>
<td>8%</td>
<td>49%</td>
<td>10%</td>
<td>33%</td>
</tr>
<tr>
<td>Vehicle configurator/build-and-price tool</td>
<td>7%</td>
<td>48%</td>
<td>13%</td>
<td>32%</td>
</tr>
<tr>
<td>Trade-in value estimator</td>
<td>12%</td>
<td>47%</td>
<td>10%</td>
<td>32%</td>
</tr>
<tr>
<td>Third-party true market pricing tools</td>
<td>12%</td>
<td>42%</td>
<td>10%</td>
<td>36%</td>
</tr>
<tr>
<td>Manufacturer communication (e.g., chat, email, social media, etc.)</td>
<td>10%</td>
<td>40%</td>
<td>13%</td>
<td>37%</td>
</tr>
<tr>
<td>Online financing/credit application</td>
<td>8%</td>
<td>40%</td>
<td>11%</td>
<td>41%</td>
</tr>
<tr>
<td>Enrollment process for subscription-based connected services (e.g. OnStar)</td>
<td>8%</td>
<td>37%</td>
<td>8%</td>
<td>47%</td>
</tr>
<tr>
<td>In-dealer tools (kiosks, tablets)</td>
<td>16%</td>
<td>34%</td>
<td>8%</td>
<td>41%</td>
</tr>
</tbody>
</table>

Q30. Considering your current vehicle purchase and ownership journey, please tell us whether or not each of the following digital experiences met your expectations.

Sample size: n=783
And it’s the same story with digital servicing touchpoints

Services such as tutorial apps and online owners manuals are available, but consumers want more out of them.

### Evaluation of digital servicing touchpoints

<table>
<thead>
<tr>
<th>Service</th>
<th>Below expectations</th>
<th>Met expectations</th>
<th>Above expectations</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>In-vehicle prompts and tutorials</td>
<td>7%</td>
<td>52%</td>
<td>12%</td>
<td>29%</td>
</tr>
<tr>
<td>Online owner’s manual</td>
<td>7%</td>
<td>47%</td>
<td>9%</td>
<td>37%</td>
</tr>
<tr>
<td>Online owner portal</td>
<td>7%</td>
<td>43%</td>
<td>10%</td>
<td>40%</td>
</tr>
<tr>
<td>Online service booking tool</td>
<td>7%</td>
<td>39%</td>
<td>9%</td>
<td>45%</td>
</tr>
<tr>
<td>Vehicle health and maintenance app</td>
<td>7%</td>
<td>37%</td>
<td>10%</td>
<td>46%</td>
</tr>
<tr>
<td>In-vehicle connected service (e.g., OnStar)</td>
<td>8%</td>
<td>34%</td>
<td>9%</td>
<td>49%</td>
</tr>
<tr>
<td>Over-the-air automatic vehicle software updates</td>
<td>8%</td>
<td>32%</td>
<td>10%</td>
<td>50%</td>
</tr>
</tbody>
</table>

Q30. Considering your current vehicle purchase and ownership journey, please tell us whether or not each of the following digital experiences met your expectations.

Sample size: n=783
Communication from dealers and manufacturers
Both OEMs and dealers could be missing a big opportunity
50% of the consumers say they were never contacted by the manufacturer after acquiring their vehicle

Q31. How many times has either the manufacturer or dealer contacted you (for any reason) after acquiring your current vehicle?
Sample size: n=783
Reasons for contact vary between OEMs and dealers
Dealers contact consumers mainly for service reminders while manufacturers contact mostly for new product information

Manufacturer touchpoints related to:
- New product information: 46%
- Regular newsletters: 34%
- Service reminders: 28%
- Brand/lifestyle information: 24%
- Warranty and recall notifications: 24%
- New/used vehicle offers/deals: 20%
- Ride and drive events: 20%
- End-of-lease notification: 16%
- Others: 6%

Dealer touchpoints related to:
- New product information: 31%
- Regular newsletters: 23%
- Service reminders: 57%
- Brand/lifestyle information: 20%
- Warranty and recall notifications: 41%
- New/used vehicle offers/deals: 40%
- Ride and drive events: 18%
- End-of-lease notification: 22%
- Others: 5%

Q32. What have you been contacted about? (Select all that apply)
Sample size, average for manufacturer and dealer: n=390, 592
Consumers more satisfied with communication from dealers...
67% of consumers said dealer communications are good/very good

Q33. How would you rate the quality of the communication you have received from both the manufacturer and dealer since acquiring your current vehicle?
Sample size, average for manufacturer and dealer : n=480
...leading to consumers preferring communication from dealers
59% of consumers prefer communication from dealers compared to only 21% from manufacturers

From whom would the consumer prefer hearing in future?

Q34. In general, who would you rather hear from going forward?
Sample size: n=783
Are consumers ready to leave the dealer behind?
**Consumers still expect F&I processes to be done at the dealer**

Majority of consumers would prefer to negotiate the vehicle price and complete the finance and insurance process at the physical dealership.

Q43. When you are ready to acquire your next vehicle, what aspects of the vehicle buying experience would you want to do at the dealership versus an online/virtual environment?

Sample size: n=900
Consumers only somewhat interested to buy direct from OEMs

Only 14% of consumers are very interested in acquiring their next vehicle directly from the manufacturer via an online process.

How interested are consumers in by-passing the dealer?

Q47. If you had the option to acquire your next vehicle directly from the manufacturer (via online process), how interested would you be?

Sample size: n=1,048
Interest even lower in buying from an online retail website
Only 7% of the consumers are very interested in buying their next vehicle from an online retail site.

How interested are consumers in buying a vehicle from an online retail site?

Q48. If you had the option to acquire your next vehicle through an online retail website (e.g., Amazon), how interested would you be? Sample size: n=1,048
Testing some forward-looking tools and scenarios
Consumers want a hassle free service experience
More than half of the consumers are interested in technology that makes the service experience easier

Consumer opinions on futuristic scenarios

- **Ability for my vehicle to self-diagnose issues and book a service appointment**
  - Not at all interested/Not very interested: 15%
  - Neutral: 24%
  - Somewhat interested/Very interested: 61%

- **An app that uses in-vehicle data and manufacturer information to explain to you what is going to be completed during an upcoming service appointment, how long it will likely take, and approximately what it will cost**
  - Not at all interested/Not very interested: 19%
  - Neutral: 25%
  - Somewhat interested/Very interested: 56%

- **An app on your smartphone that allows you to remotely manage vehicle functions, provides vehicle health metrics**
  - Not at all interested/Not very interested: 22%
  - Neutral: 28%
  - Somewhat interested/Very interested: 50%

- **Ability to use augmented/virtual reality technology to explore a variety of new vehicles and simulate the driving experience in the dealer showroom**
  - Not at all interested/Not very interested: 27%
  - Neutral: 29%
  - Somewhat interested/Very interested: 44%

- **Ability to complete a vehicle purchase online so you never have to step foot in a dealership**
  - Not at all interested/Not very interested: 48%
  - Neutral: 25%
  - Somewhat interested/Very interested: 27%

Q44. How interested would you be in each of the following scenarios?
Sample size: n=900
Consumers are most interested in maintenance updates

More than 70% of the consumers are looking for benefits such as maintenance updates, cost forecasts, and customized insurance plans.

### Consumer opinions on benefits of connected vehicles

<table>
<thead>
<tr>
<th>Benefit</th>
<th>Not at all interested/Not very interested</th>
<th>Neutral</th>
<th>Somewhat/Very interested</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maintenance updates and vehicle health reporting</td>
<td>6%</td>
<td>19%</td>
<td>75%</td>
</tr>
<tr>
<td>Maintenance cost forecasts based on your driving habits</td>
<td>7%</td>
<td>20%</td>
<td>73%</td>
</tr>
<tr>
<td>Customized/optimized vehicle insurance plan</td>
<td>9%</td>
<td>20%</td>
<td>71%</td>
</tr>
<tr>
<td>Updates regarding traffic congestion and suggested alternate routes</td>
<td>9%</td>
<td>21%</td>
<td>70%</td>
</tr>
<tr>
<td>Customized suggestions regarding ways to minimize service expenses</td>
<td>8%</td>
<td>23%</td>
<td>69%</td>
</tr>
<tr>
<td>Having access to a Wi-Fi connection in your vehicle</td>
<td>14%</td>
<td>24%</td>
<td>62%</td>
</tr>
<tr>
<td>Access to parking (i.e., availability, booking, and payment)</td>
<td>11%</td>
<td>27%</td>
<td>62%</td>
</tr>
<tr>
<td>Over-the-air vehicle software updates</td>
<td>11%</td>
<td>27%</td>
<td>62%</td>
</tr>
<tr>
<td>Increased level of autonomous capability in your vehicle</td>
<td>13%</td>
<td>31%</td>
<td>56%</td>
</tr>
<tr>
<td>Special offers regarding non-automotive products and services related to your journey or destination</td>
<td>19%</td>
<td>33%</td>
<td>48%</td>
</tr>
</tbody>
</table>

Q50. As vehicles become more and more connected via the Internet, how interested are you in the following benefits if it meant sharing the operational data your vehicle collects with the manufacturer and/or third parties?

Sample size: n=1,048
The 2018 Deloitte Global Automotive Consumer Study includes 22,177 consumer responses across 15 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. It was fielded in 17 countries and designed to be nationally representative of the overall population in each country.