EY Mobility Consumer Index (MCI) 2023 study
Launched in 2020, the EY Mobility Consumer Index (MCI) is an annual study that provides unique insights on the shifts witnessed in travel patterns and mobility mix.

Based on a global survey of respondents, the MCI also aims to gauge the car-buying intent, analyze the pace of shift toward the adoption of electric vehicles, and assess the consumers’ car-buying journey process.

Survey details
- 20 countries
- 15k respondents
- Conducted in March 2023

Themes covered
- Mobility/travel behavior
- Car buying and powertrain
- Electric vehicles, Connected vehicles and sustainability
- Retail analysis

Survey locations
- Americas
  - Brazil
  - Canada
  - Mexico
  - US
- Asia-Pacific
  - Australia
  - China
  - India
  - Japan
  - New Zealand
  - Singapore
  - South Korea
- Europe
  - Austria
  - France
  - Germany
  - Italy
  - Netherlands
  - Norway
  - Spain
  - Sweden
  - UK

Added in 2023 study
Changing lanes: evolving mobility behavior
Share of respondents working remotely registered a decline as the shift toward return to office becomes increasingly evident

How often do you work or study remotely/from home now?

% of people working remotely at least 3 or 4 times a week

<table>
<thead>
<tr>
<th></th>
<th>Before Covid-19</th>
<th>During Covid-19</th>
<th>Now</th>
</tr>
</thead>
<tbody>
<tr>
<td>2021 study</td>
<td>17%</td>
<td>73%</td>
<td>32%</td>
</tr>
<tr>
<td>2022 study</td>
<td>17%</td>
<td>48%</td>
<td>31%</td>
</tr>
<tr>
<td>2023 study</td>
<td>—</td>
<td>—</td>
<td>24%</td>
</tr>
</tbody>
</table>

Shift in work frequency patterns

<table>
<thead>
<tr>
<th></th>
<th>Before C-19</th>
<th>During C-19</th>
<th>2022</th>
<th>2023</th>
</tr>
</thead>
<tbody>
<tr>
<td>No work from home</td>
<td>4%</td>
<td>3%</td>
<td>2%</td>
<td>10%</td>
</tr>
<tr>
<td>1-2 times a week</td>
<td>8%</td>
<td>14%</td>
<td>17%</td>
<td>14%</td>
</tr>
<tr>
<td>3-4 times a week</td>
<td>55%</td>
<td>29%</td>
<td>19%</td>
<td>25%</td>
</tr>
</tbody>
</table>

Note: Work travel includes travel for work and study

Hybrid mode gradually shifting toward more days in office

Wave 4


No work from home

Less than once a week

1-2 times a week

3-4 times a week

Wave 4

Before Covid-19 During Covid-19 Now

2021 study

2022 study

2023 study
Respondents indicate an increase in use of personal cars for both work/study and non-work/non-study travel

How frequently do you now travel for work or study using the following modes of transportation?

<table>
<thead>
<tr>
<th>% share of respondents using a specific mode at least once a week</th>
<th>% POINTS CHANGE FROM 2022</th>
<th>% share of respondents using a specific mode at least 1-2 times a week</th>
<th>% POINTS CHANGE FROM 2022</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Work/study - 2023</strong></td>
<td></td>
<td><strong>Non-work/non-study - 2023</strong></td>
<td></td>
</tr>
<tr>
<td>Personal 4 wheeler</td>
<td>73%</td>
<td>▲ 5%</td>
<td>73%</td>
</tr>
<tr>
<td>Public Transport</td>
<td>41%</td>
<td>▼ -2</td>
<td>37%</td>
</tr>
<tr>
<td>Shared mobility</td>
<td>24%</td>
<td>▼ -2</td>
<td>24%</td>
</tr>
<tr>
<td>Micromobility</td>
<td>23%</td>
<td>▼ -1</td>
<td>21%</td>
</tr>
<tr>
<td>Personal 2 wheeler</td>
<td>20%</td>
<td>-</td>
<td>17%</td>
</tr>
<tr>
<td>Car sharing/rental</td>
<td>12%</td>
<td>▼ -4</td>
<td>10%</td>
</tr>
</tbody>
</table>

Note: Shared mobility includes private and shared ride hailing + traditional taxi service; micromobility includes personal and shared e-scooters/bikes.
Gen Z and millennial respondents are more inclined toward multimodal travel and primarily prefer public transport, personal cars and shared mobility for it.

When you use multiple modes of transport in the same trip, which of the following do you typically use? Please select all that apply.

<table>
<thead>
<tr>
<th>Preferred modes for multimodal travel and frequency of use (at least once a week)</th>
<th>% of respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public transport</td>
<td>72%</td>
</tr>
<tr>
<td>Personal car</td>
<td>69%</td>
</tr>
<tr>
<td>Ride hailing + traditional taxi</td>
<td>50%</td>
</tr>
<tr>
<td>Micro-mobility</td>
<td>40%</td>
</tr>
<tr>
<td>Personal two wheeler</td>
<td>30%</td>
</tr>
<tr>
<td>Car sharing/rental</td>
<td>20%</td>
</tr>
</tbody>
</table>

- Gen Z is much more receptive to diverse modes of travel or hybrid mobility.
- While increasing aspirations around sustainability drive their inclination toward public transport, they haven't completely rejected the use of a personal car.
- In the case of millennial respondents, shared and micromobility also play a prominent role in shaping multimodal travel preferences.

Use multimodal travel at least once a week

- Gen Z: 72%
- Millennials: 69%
- Gen X: 50%
- Boomers: 39%
Driving forward: car demand stays steady
Car-buying intent continues to be strong: While the share of non-car owners intending to buy new cars declined by 2%, the same for car owners registered a 3% increase (y-o-y).

How likely are you to purchase a car in the next 24 months?

Car-buying intent (% of respondents choosing extremely likely and somewhat likely)

<table>
<thead>
<tr>
<th></th>
<th>New car</th>
<th>Used car</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall</td>
<td>33%</td>
<td>11%</td>
<td>44%</td>
</tr>
<tr>
<td>Car owners</td>
<td>39%</td>
<td>12%</td>
<td>52%</td>
</tr>
<tr>
<td>Non-car owners</td>
<td>11%</td>
<td>9%</td>
<td>20%</td>
</tr>
</tbody>
</table>

When would you make the purchase of your next car?

<table>
<thead>
<tr>
<th></th>
<th>Within 12 months</th>
<th>12-24 months</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall</td>
<td>64%</td>
<td>36%</td>
</tr>
<tr>
<td>Car owners</td>
<td>66%</td>
<td>34%</td>
</tr>
<tr>
<td>Non-car owners</td>
<td>51%</td>
<td>49%</td>
</tr>
</tbody>
</table>

Note: In the survey, 76% of respondents were car owners, while the remaining 24% were non-car owners.
Car body style: While 43% of respondents intending to buy new cars favor SUVs, the style preference-mix for used cars is evenly distributed (SUVs, sedans and hatchbacks).

What kind of car (body style) are you planning to buy?

- SUVs dominate new car purchase intention.
- In the case of used cars, however, preference is well distributed across major body types (hatchbacks, SUVs and sedans).

According to the IEA, over 400 EV models were available on the market in 2022, and over half of these (~55%) were SUVs.
EVolution: consumer confidence gains momentum
Purchase intention for EVs (BEV, hybrid and plug-in hybrid) continues to increase, signaling an ever-growing consumer confidence.

You indicated you are planning to buy a car; which of the following car fuel types are you most likely to buy?

**EV-buying intent**

<table>
<thead>
<tr>
<th>% of respondents planning to buy a car</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fully electric/plug-in hybrid/hybrid</td>
</tr>
<tr>
<td>Hybrid</td>
</tr>
<tr>
<td>Fully electric</td>
</tr>
<tr>
<td>Plug-in hybrid</td>
</tr>
</tbody>
</table>

- **Fully electric/plug-in hybrid**
  - 2020: 30.0%
  - 2021: 40.7%
  - 2022: 51.6%
  - 2023: 55.1%

- **Hybrid**
  - 2020: 16.0%
  - 2021: 19.2%
  - 2022: 21.3%
  - 2023: 22.6%

- **Fully electric**
  - 2020: 7.0%
  - 2021: 9.6%
  - 2022: 10.0%
  - 2023: 12.2%

- **Plug-in hybrid**
  - 2020: 7.0%
  - 2021: 9.6%
  - 2022: 10.0%
  - 2023: 12.2%

Rising consumer intent for EVs
- Consumer confidence in EVs has increased significantly in the markets such as US, Sweden and Japan.

Strong EV interest reflected in sales volume
- In 2022, the global market share of EVs reached 18% from 7% in 2020. However, in Norway, the market share reached nearly 80%.

Increased government push
- Around 20 key markets have set electrification targets and, under COP26, about 60 countries, including the EU have made net-zero pledges to 2050.
Wave 4

EV-buying intent across geographies witnessed a spike due to factors such as favorable government incentives, price cuts and lower cost of ownership.

You indicated you are planning to buy a car; which of the following car fuel types are you most likely to buy?

* Includes all three alternative powertrains (BEV, plug-ins and hybrid)

- China: 75%
- Italy: 70%
- Norway: 67%
- Spain: 66%
- Sweden: 64%
- Japan: 64%
- Singapore: 63%
- South Korea: 59%
- Brazil: 57%
- UK: 54%
- France: 54%
- Canada: 52%
- Germany: 51%
- Netherlands: 48%
- United States: 48%
- India: 48%
- Austria: 47%
- Mexico: 44%
- New Zealand: 42%
- Australia: 37%

GLOBAL AVERAGE: 55%

% POINTS CHANGE FROM 2022

+6%  -3%  +6%  +4%  +12%  +11%  +7%  -4%  -  +5%  +6%  +6%  +6%  +2%  +19%  +3%  -  +1%  -7%  -1%

- US: The Inflation Reduction Act provide a tax incentive to up to US$7,500, which is expected to further increase the EV uptake from 10.6% of all vehicles sold in 2022 to 14.9% in 2023.
- Nordics: The region has been a front-runner in EV adoption, with manufacturers producing high quality EVs and encouraging more consumers to consider them as a viable alternative.
**Motivators:** High fuel prices, rising environmental concerns and penalties on ICE vehicle are emerging to be the key motivators for potential EV buyers.

Why are you considering buying an/another EV? (in the next few years).

**TOP FIVE MOTIVATORS FOR RESPONDENTS TO BUY AN EV**

<table>
<thead>
<tr>
<th>2021 study</th>
<th>2022 study</th>
<th>2023 study</th>
</tr>
</thead>
<tbody>
<tr>
<td>49% Environmental concerns</td>
<td>38% Environmental concerns</td>
<td>38% High fuel/oil/gas prices</td>
</tr>
<tr>
<td>29% Monetary incentives</td>
<td>34% Rising penalties on ICE</td>
<td>36% Environmental concerns</td>
</tr>
<tr>
<td>28% Longer range</td>
<td>25% Monetary incentives</td>
<td>25% Rising penalties on ICE</td>
</tr>
<tr>
<td>28% Better charging infrastructure</td>
<td>25% Cost of ownership</td>
<td>21% Longer range</td>
</tr>
<tr>
<td>26% Cost of ownership</td>
<td>24% Longer range</td>
<td>21% Cost of ownership</td>
</tr>
</tbody>
</table>

Note: Figures indicate the sum of the top three ranks of the share of responses per category.
High fuel/oil/gas prices have become a significant driving force for EV adoption among consumers

High fuel/oil/gas prices as a key motivator for purchasing an EV*

<table>
<thead>
<tr>
<th>% of respondents</th>
<th>New Zealand</th>
<th>Netherlands</th>
<th>Sweden</th>
<th>Canada</th>
<th>South Korea</th>
<th>Brazil</th>
<th>France</th>
<th>Australia</th>
<th>Spain</th>
<th>Austria</th>
<th>Italy</th>
<th>UK</th>
<th>Mexico</th>
<th>Norway</th>
<th>India</th>
<th>Japan</th>
<th>Germany</th>
<th>United States</th>
<th>Singapore</th>
<th>China</th>
</tr>
</thead>
<tbody>
<tr>
<td>55%</td>
<td>53%</td>
<td>50%</td>
<td>49%</td>
<td>48%</td>
<td>46%</td>
<td>46%</td>
<td>44%</td>
<td>42%</td>
<td>40%</td>
<td>39%</td>
<td>38%</td>
<td>36%</td>
<td>34%</td>
<td>31%</td>
<td>29%</td>
<td>27%</td>
<td>24%</td>
<td>22%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Note: Figures indicate the sum of the top three ranks of the share of responses per category.

EVs* include BEVs, PHEVs and hybrids.
Powering progress: chargers aren’t home yet
Concerns: Favourable government subsidies have reduced upfront purchase cost for EVs; however, lack of charging infrastructure and range anxiety continue to be the key deterrents for consumers

Why are you not considering buying an EVs for your next car purchase?

TOP FIVE CONCERNS FOR RESPONDENTS TO BUY AN EV

<table>
<thead>
<tr>
<th>2021 study</th>
<th>2022 study</th>
<th>2023 study</th>
</tr>
</thead>
<tbody>
<tr>
<td>50% Upfront purchase cost</td>
<td>34% Lack of charging stations</td>
<td>31% Lack of charging stations</td>
</tr>
<tr>
<td>33% Limited range of EVs</td>
<td>33% Limited range of EVs</td>
<td>29% Limited range of EVs</td>
</tr>
<tr>
<td>32% Lack of charging stations</td>
<td>27% Upfront purchase cost</td>
<td>28% Upfront purchase cost</td>
</tr>
<tr>
<td>26% Absence of charging</td>
<td>Inadequate home/workplace charging infrastructure</td>
<td>Inadequate home/workplace charging infrastructure</td>
</tr>
<tr>
<td>25% Running cost</td>
<td>26% Running cost</td>
<td>25% Running cost</td>
</tr>
</tbody>
</table>

- At the grid level, 
  lengthy permitting processes, compounded by bureaucracy and a lack of standardized procedures, is delaying the charging infrastructure deployment in a few key markets.
- Countries such as France, Germany and the UK do not meet the AFID* recommended charger availability criteria (EV/EV Supply Equipment ratio of 10), due to the inadequate grid capacity and prolonged funding mandates.

*AFID: Alternative Fuels Infrastructure Directive

Note: Figures indicate sum of the top three ranks of the share of responses per category
Lack of charging stations emerges as a prominent inhibitor that hinders consumer adoption of EVs

Lack of charging stations as a key concern for respondents not considering an EV

% of respondents

- Sweden: 47%
- Mexico: 45%
- Italy: 40%
- Spain: 37%
- UK: 37%
- Norway: 37%
- Australia: 36%
- Brazil: 36%
- South Korea: 34%
- Singapore: 33%
- Netherlands: 32%
- China: 29%
- United States: 29%
- India: 27%
- Germany: 27%
- France: 24%
- Canada: 24%
- Japan: 23%
- New Zealand: 17%
- Austria: 13%

GLOBAL AVERAGE: 31%

* EVs include BEVs, PHEVs and hybrids.

Note: Figures indicate the sum of the top three ranks of the share of responses per category.
The recent spike in energy costs has raised concerns among European respondents; high-rise dwellers in China have also expressed concerns about space availability for chargers.

What is your main concern (if any) regarding at-home charging facilities for EVs?

<table>
<thead>
<tr>
<th>Safety of home EV charging</th>
<th>Electricity bills</th>
<th>High installation cost</th>
<th>Space availability to charge at home</th>
<th>Unsure of the variety of EV home charging facilities</th>
<th>Complexity involved in installation</th>
<th>Receiving approval from power utility company</th>
</tr>
</thead>
<tbody>
<tr>
<td>47%</td>
<td>44%</td>
<td>46%</td>
<td>38%</td>
<td>31%</td>
<td>28%</td>
<td>24%</td>
</tr>
<tr>
<td>GLOBAL</td>
<td>NORTH AMERICA</td>
<td>EUROPE</td>
<td>ASIA-PACIFIC</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>50%</td>
<td>40%</td>
<td>38%</td>
<td>59%</td>
<td>35%</td>
<td>39%</td>
<td>46%</td>
</tr>
<tr>
<td>54%</td>
<td>51%</td>
<td>51%</td>
<td>35%</td>
<td>39%</td>
<td>37%</td>
<td>46%</td>
</tr>
<tr>
<td>24%</td>
<td>21%</td>
<td>26%</td>
<td>28%</td>
<td>27%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **EU:** Russia’s war on Ukraine and its decision to suspend deliveries of fuel/gas to some EU Member States has pushed up the electricity price in the region, affecting nearly 54% of the surveyed consumers.
- **China:** As majority of Chinese respondents (78%) reside in a major metropolitan area (city center), space availability for home chargers is a major concern.
Wave 4

More than 50% of respondents in Europe consider charging costs as the key deterrent; high-rise dwellers in China are more concerned about the long waiting time.

When it comes to charging an EV at a non-residential location/public charging facility, what would you say are the most important factors?

<table>
<thead>
<tr>
<th>GLOBAL</th>
<th>NORTH AMERICA</th>
<th>EUROPE</th>
<th>ASIA-PACIFIC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Locating/finding a charging station</td>
<td>46%</td>
<td>53%</td>
<td>47%</td>
</tr>
<tr>
<td>Expensive charging costs</td>
<td>44%</td>
<td>31%</td>
<td>39%</td>
</tr>
<tr>
<td>Long wait times</td>
<td>44%</td>
<td>42%</td>
<td>53%</td>
</tr>
<tr>
<td>Broken/non-functional chargers</td>
<td>32%</td>
<td>29%</td>
<td>31%</td>
</tr>
<tr>
<td>Blocked charger ports (i.e. inability to access)</td>
<td>30%</td>
<td>32%</td>
<td>36%</td>
</tr>
<tr>
<td>Safety of my car</td>
<td>26%</td>
<td>34%</td>
<td>32%</td>
</tr>
<tr>
<td>Interoperability issues (i.e. charger not...)</td>
<td>24%</td>
<td>33%</td>
<td>29%</td>
</tr>
<tr>
<td>Concerns about my personal safety</td>
<td>16%</td>
<td>24%</td>
<td>23%</td>
</tr>
<tr>
<td>None of the above</td>
<td>9%</td>
<td>4%</td>
<td>4%</td>
</tr>
</tbody>
</table>

- **EU**: More than 50% of respondents from the EU have raised concerns about the high cost of charging. Cost per charge in a few European countries, such as Spain and Germany, is above US$25, compared with nearly US$16 in US and US$12 in Canada.
- **China**: Around 69% of buyers in China are apprehensive due to longer waiting times. Instances of a waiting time of up to four hours have led the government to drastically push battery swapping services in the country.
Revving up retail: balancing online, offline and virtual experiences
While potential car buyers prefer an online channel for gathering vehicle information, dealerships continue to be prominent at other stages of the customer interaction lifecycle.

<table>
<thead>
<tr>
<th>Wave 4</th>
<th>Information gathering</th>
<th>Pre-purchase testing</th>
<th>Purchase</th>
<th>Customer care</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Prominent channel</strong></td>
<td>Offline</td>
<td>Online</td>
<td>Offline</td>
<td>Online</td>
</tr>
<tr>
<td>Offline (dealerships/showrooms)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Interact with salesperson at dealership</td>
<td>55%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Visit dealership to see and experience the car physically</td>
<td></td>
<td>66%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Visit multiple dealerships to get the best quote</td>
<td></td>
<td></td>
<td>61%</td>
<td></td>
</tr>
<tr>
<td>Visit authorized dealerships/manufacturer to service the car</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Online (dealership/OEM websites, third-party websites)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Use dealership/OEM websites/social media/third-party apps</td>
<td>87%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>AR/VR will make their car purchase decision easier</td>
<td></td>
<td>30%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Purchase car from online sources</td>
<td></td>
<td></td>
<td>25%</td>
<td></td>
</tr>
<tr>
<td>Prefer scheduling maintenance services directly from the website/mobile app</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Want car breakdown, tracking, recovery and emergency assistance-related features in their connected car</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Almost 90% of potential car buyers research the vehicle online; dealers increase their investments in digital advertising.

NEW CAR

How do you gather information before buying a car?

- **Online sources**: 88%
- **With salespeople at dealerships**: 57%
- **Consulting friends or family about cars/features that I am interested in**: 52%
- **Brand stores/pop-up stores**: 29%
- **Print media**: 23%
- **Manufacturer/dealership websites**: 69%
- **Social media/open sources**: 50%
- **Third party websites**: 34%
Dealerships/showrooms continue to be the preferred channel for purchasing a new car, reaffirming their importance in the buying journey.

NEW CAR

Which option would you most likely choose when buying a new car?

<table>
<thead>
<tr>
<th>Option</th>
<th>Overall</th>
<th>Boomers</th>
<th>Gen X</th>
<th>Millennials</th>
<th>Gen Z</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dealerships/Showrooms</td>
<td>67%</td>
<td>73%</td>
<td>68%</td>
<td>64%</td>
<td>60%</td>
</tr>
<tr>
<td>Directly from manufacturer's website</td>
<td>11%</td>
<td>13%</td>
<td>12%</td>
<td>9%</td>
<td>9%</td>
</tr>
<tr>
<td>Dealership website</td>
<td>8%</td>
<td>7%</td>
<td>8%</td>
<td>14%</td>
<td>16%</td>
</tr>
<tr>
<td>Third-party marketplaces/online channels</td>
<td>3%</td>
<td>1%</td>
<td>2%</td>
<td>3%</td>
<td>12%</td>
</tr>
<tr>
<td>Will evaluate all options</td>
<td>11%</td>
<td>8%</td>
<td>7%</td>
<td>9%</td>
<td>9%</td>
</tr>
</tbody>
</table>

Change vs 2022:
- Dealerships/Showrooms: +3%
- Directly from manufacturer's website: +1%*
- Dealership website: +1%
- Third-party marketplaces/online channels: +1%
- Will evaluate all options: -3%

By generation:

"The dealer franchise system is the most consumer-friendly, efficient and effective model of distribution for motor vehicles in the US. Dealers are truly essential to the future of ICE and EVs ... only a local dealership network can provide the personal relationship consumers want." - Mike Alford, National Automobile Dealers Association (NADA) Chairman

*Includes both manufacturer and dealership websites.
Connected but not convinced: consumer preference remains tepid
Real-time traffic alerts and car breakdown, tracking, recovery and emergency assistance emerge as the most important features in a connected car.

Which of the features related to connecting the car to the internet would you use?

- **Real-time traffic alerts/navigation**: 62%
- **Car breakdown, tracking, recovery and emergency assistance**: 62%
- **Location monitoring for security**: 44%
- **In-car entertainment**: 35%
- **Insurance premium based on driving data and behavior**: 29%
- **Automatic service alerts direct to or from dealer**: 29%
- **Over-the-air (OTA) updates for product improvement by a car manufacturer**: 19%
- **Notifications of discounts and recommendations for nearby shops and restaurants**: 17%
- **In-car payment features to enhance customer experience (e.g., automated payment)**: 15%
- **Location sharing for direct to trunk services (e.g., purchase of food, goods from an e-shop)**: 14%
Consumers are willing to pay a premium only where they see a practical use case, such as emergency call; willingness to pay for “good to have” connected car features is low.

Which of the following connectivity technologies are you willing to pay more for?

- 46% Safety features such as automated emergency call (in case of an accident)
- 28% Vehicle can self-diagnose/schedule service appointments
- 25% Communication technology to optimize traffic flow
- 24% Automatically find and pay for parking
- 24% Ability to connect to the internet to facilitate infotainment and personal communication activities

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

- Charged on a per use basis: 0.38
- Up front as part of the vehicle purchase price/leasing or subscription agreement: 0.3
- As part of a monthly service to which I subscribe: 0.24
- None of the above: 0.08

Wave 4
Respondents interested in connected car features are comfortable sharing their personal data with car manufacturer, insurance company and vehicle dealer.

Which of the following entities would you trust to access the personal data being generated?

<table>
<thead>
<tr>
<th>% of respondents</th>
<th>Respondents interested in connect car features</th>
<th>Potential new car buyers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Insurance company</td>
<td>46%</td>
<td>55%</td>
</tr>
<tr>
<td>Car manufacturer</td>
<td>42%</td>
<td>51%</td>
</tr>
<tr>
<td>Vehicle dealer</td>
<td>32%</td>
<td>45%</td>
</tr>
<tr>
<td>Government agency</td>
<td>27%</td>
<td>31%</td>
</tr>
<tr>
<td>Financial service providers</td>
<td>21%</td>
<td>29%</td>
</tr>
<tr>
<td>I am not willing to share my personal data</td>
<td>19%</td>
<td>20%</td>
</tr>
<tr>
<td>Third-party apps</td>
<td>15%</td>
<td>9%</td>
</tr>
</tbody>
</table>
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Contacts

Giovanni PASSALACQUA
Partner e Automotive Consulting Leader di EY in Italia
 giovanni.passalacqua@it.ey.com
 +39 3351635903