FEDERATION INTERNATIONALE DE L'AUTOMOBILE X STATISTA Q

Understanding Drivers' Preferences & Attitudes in Europe

Full Report

July 2023

REGION I

This report illustrates the drivers' preferences and attitudes in Europe, including 11 country deep dives

REGION I

Study Design

The 2023 survey gatherers in-depth insights about drivers' habits, preferences, and attitudes towards SMR and telematics system

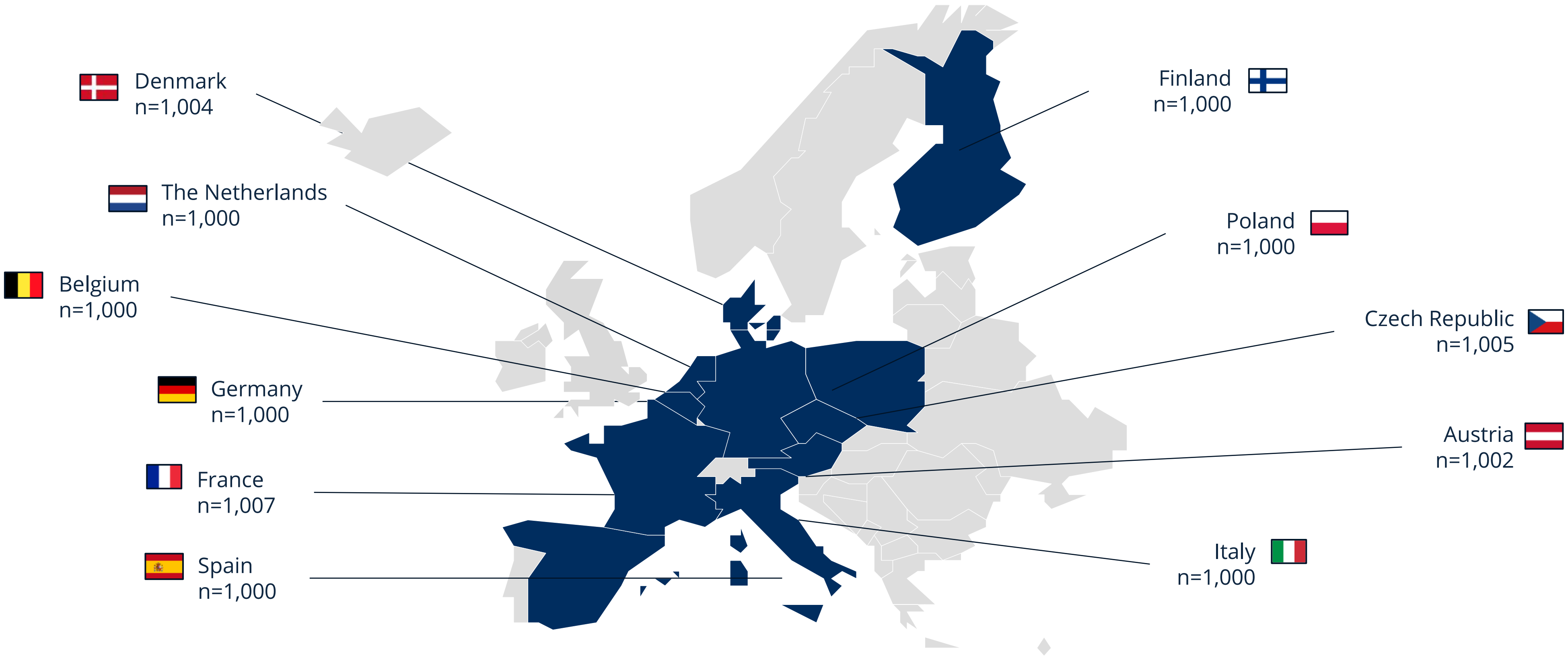
Study Design I/II

Background:	The FIA has run several market research projects to understand drivers' habits and preferences about their cars and attitudes towards different topics. The two most recent studies dealt with maintenance, service, insurance, entertainment, and car telematics systems. The survey in 2023 merges and tracks insights from the existing surveys and gathers new findings about drivers' attitudes toward telematics systems and data awareness in the specific countries.
Methodology:	Online survey among car drivers
Sample:	Regular car drivers aged 18+ years old (100% in charge of workshop visits for SMRs)
Region:	Germany, Spain, Italy, France, Finland, Denmark, Poland, Belgium, the Netherlands, Austria and the Czech Republic
Field time:	22.05.2023 to 02.06.2023

REGION I

The study covers the following 11 European countries and respective sample sizes

Study Design II/II



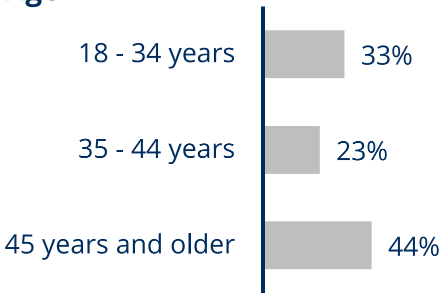
European Overview

Around 1/3 of the drivers are in motor clubs - in general independent networks are preferred over manufacturer ones

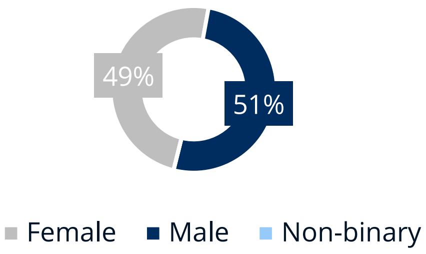
Country Characteristics Europe

SOCIODEMOGRAPHICS & MEMBERSHIP

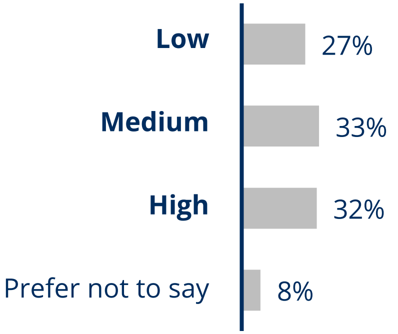
Age



Gender



Income



Motor club Membership

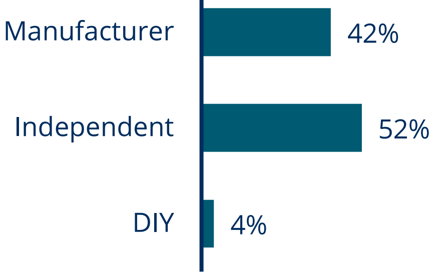
28% Yes

No **72%**

VEHICLE & ATTITUDE

Vehicle Ownership

SMR Preference



Vehicle Age

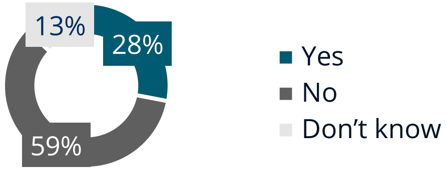
7 years (Median)

Willingness to Pay for Car Apps

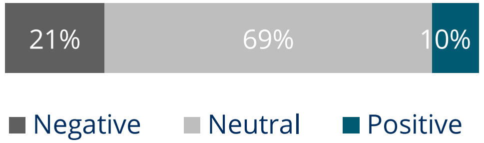
29% Yes

No **71%**

Connected Car



Attitude towards (Legislative) Market Development

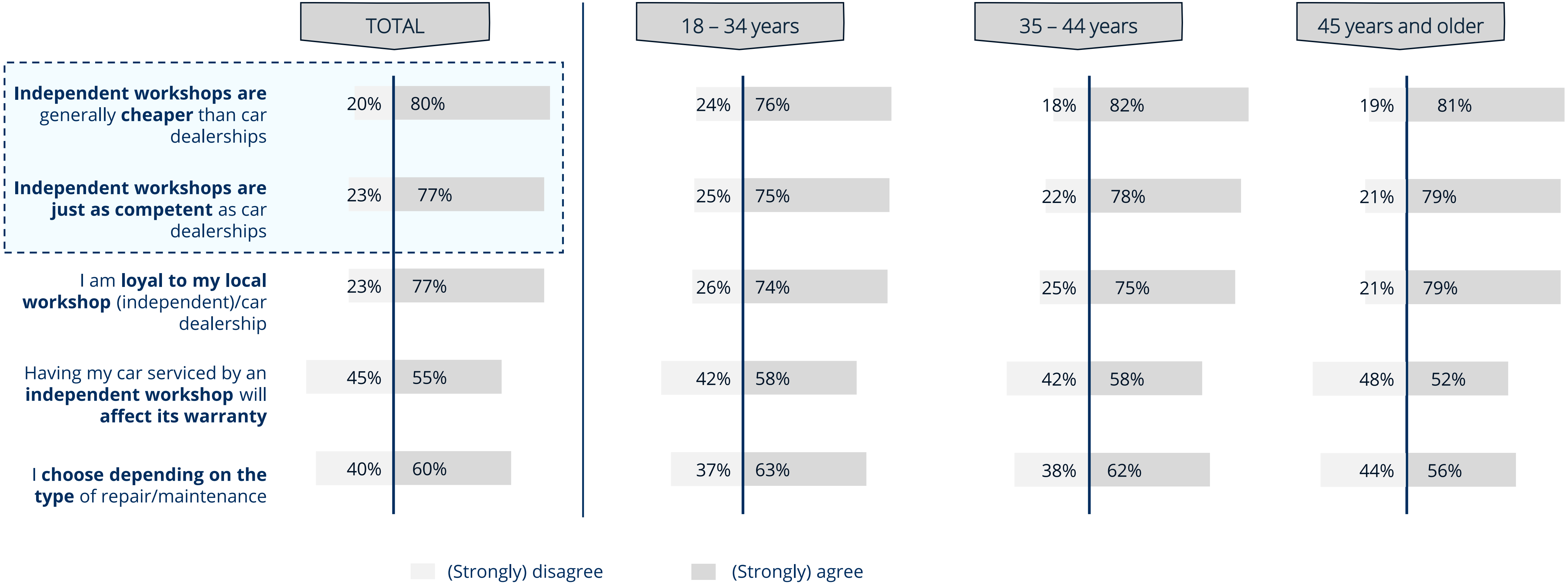


Question Q 1: What is your gender?, **Q 2:** How old are you?, **Q 10:** How old is your car?, **Q 40:** About how high is the annual gross income that your household has at its disposal, before tax and contributions?, **Q 43:** Are you currently member of motorist club?, **Q 11:** How did you acquire your car?, **Q 15:** What is your strategy of selecting a service/workshop for your car when needing regular maintenance?, **Q 28:** Would you consider paying for dedicated apps offered [...]?, **Q 34:** Is your car connected?, **Q 39:** There is a debate whether legislation should, [...]. What results would you expect from such regulations?
Bases: Europe: Total n= 11,011. **Source:** Statista Q 2023.

REGION I

8 in 10 assume that independent WSs are cheaper but as competent as car dealerships – Only slight differences between age groups

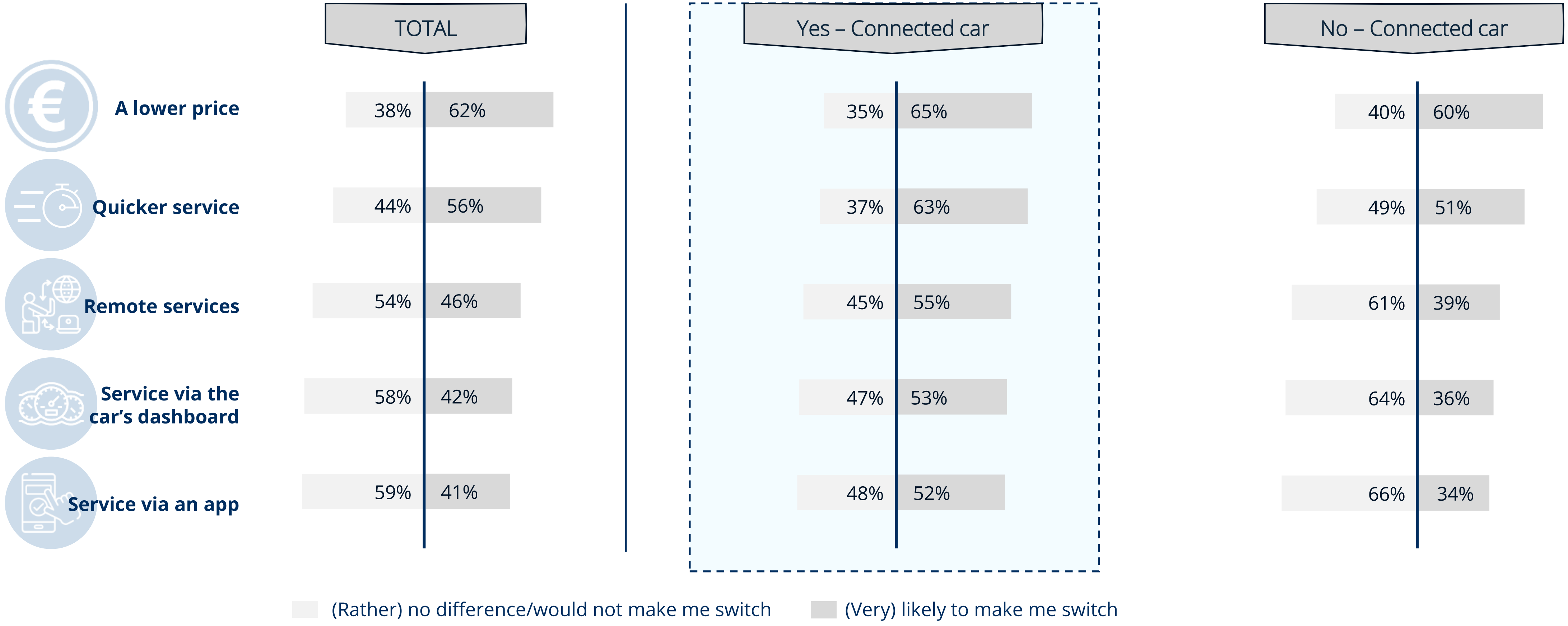
Top 5 statements about car repair/maintenance – by age
All respondents in %, top 2 and bottom 2 values shown



Question Q 19: For car repair/maintenance, to what extent would you agree with each of the following statements?
Bases: Europe: Total n= 11,011, 18 – 34 years n= 3,656, 35 – 44 years n= 2,542, 45 years and older n= 4,813. **Source:** Statista Q 2023.

Half of the drivers of a connected car would be willing to switch to an independent workshop based on remote and digital services

Arguments for switching workshop type: **manufacturer to independent** – by car connectivity ('don't know' not displayed)
Respondents who prefer manufacturer networks/workshops in %, top 2 and bottom 2 values shown



Question Q 20.1: How likely are you to switch to an independent workshop in the following situations? If the independent workshop...
Bases: Europe: Total n= 4,575, Connected Car yes / no n= 1,823 / 2,117. **Source:** Statista Q 2023.

FIA REGION I

SMR Network

Similar picture for independent preferers: lower prices, service speed, and remote services entice switching to manufacturer WSs

Arguments for switching workshop type: **independent to manufacturer** – by car connectivity
Respondents who prefer independent networks/workshops in %, top 2 and bottom 2 values shown

	TOTAL		Yes – Connected car		No – Connected car	
	(Rather) no difference/would not make me switch	(Very) likely to make me switch	(Rather) no difference/would not make me switch	(Very) likely to make me switch	(Rather) no difference/would not make me switch	(Very) likely to make me switch
A lower price	24%	76%	24%	76%	24%	76%
Quicker service	46%	54%	36%	64%	49%	51%
Remote services	54%	46%	41%	59%	58%	42%
Service via the car's dashboard	64%	36%	47%	53%	69%	31%
Service via an app	66%	34%	50%	50%	71%	29%

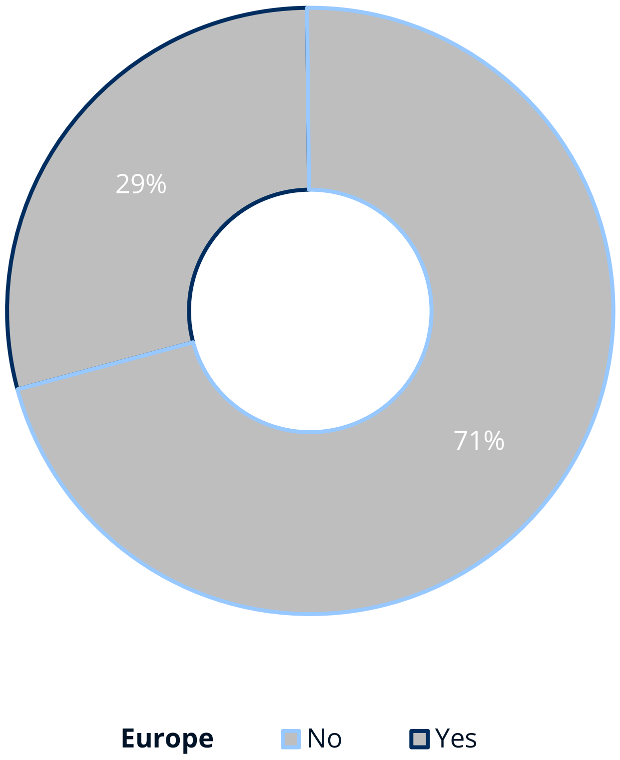
(Rather) no difference/would not make me switch   (Very) likely to make me switch

Question Q 20.2: How likely are you to switch to a manufacturer workshop in the following situations? If the manufacturer workshop….
Bases: Europe: Total n= 5,776, Connected Car yes / no n= 1,123 / 3,940. **Source:** Statista Q 2023.
.

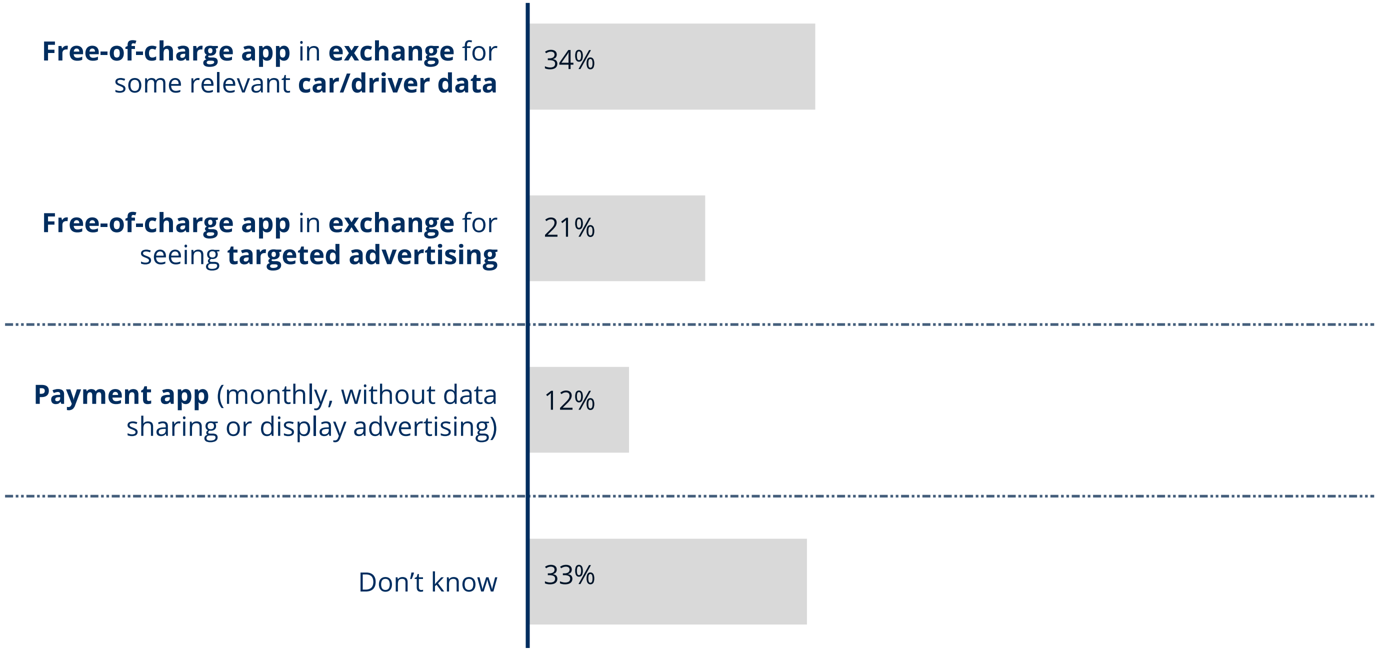
Around 1/3 of the drivers consider paying for car apps – Preferred service model: Free-of-charge in exchange for data, but many are still undecided

Considering paying for dedicated car apps and preferred service model
All respondents in %

Considering paying for car apps



Preferred car app service model

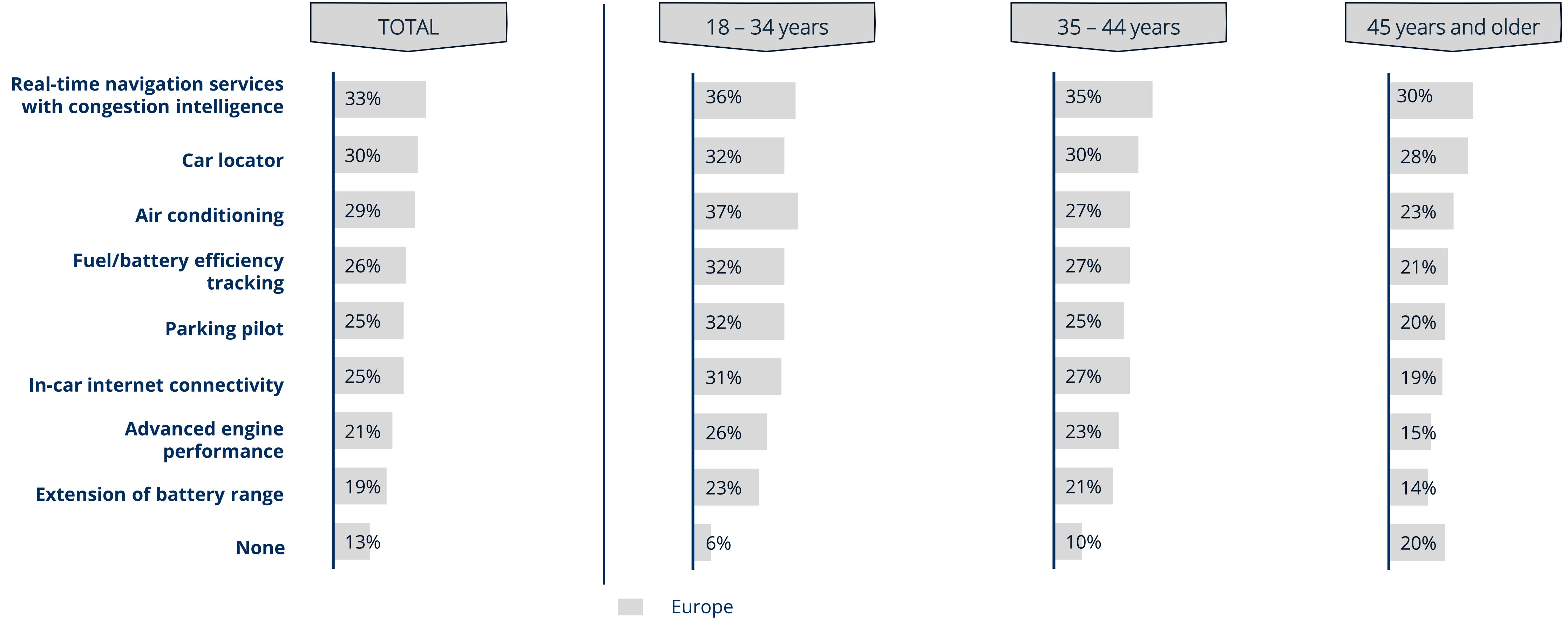


Question Q 28: Would you consider paying for dedicated apps offered exclusively for the cars display/screen?; **Question Q 29:** Dedicated car apps can be offered in various ways: Which of the following service models do you prefer?
Bases: Europe: Total n= 11,011. **Source:** Statista Q 2023.

REGION I

The younger generation is more willing to pay for connected car services – real-time navigation and car locator are the most sought-after

Services in a 'connected car' respondents are willing to pay for – by age
All respondents in %



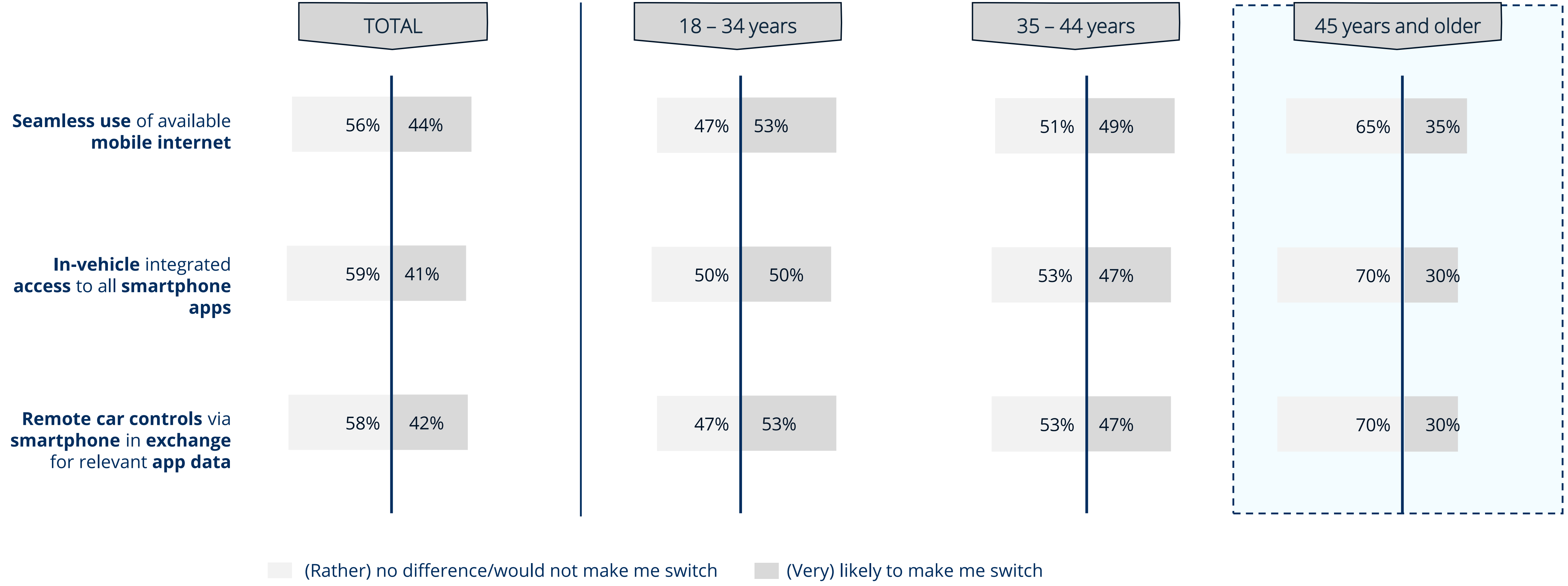
Question Q 32: For which of the following services in a 'connected car', would you generally be willing to pay a monthly amount?
Bases: Europe: Total n= 11,011, 18-34 years n= 3,656, 35-44 years n= 2,542, 45 years and older n= 4,813 . **Source:** Statista Q 2023

REGION I

In general, internet and app usage does not convince the majority of the drivers to switch to another brand – drivers aged 45+ are even less interested

Willingness to switch the brand based on internet and app usage – by age

All respondents in %, top 2 and bottom 2 values shown



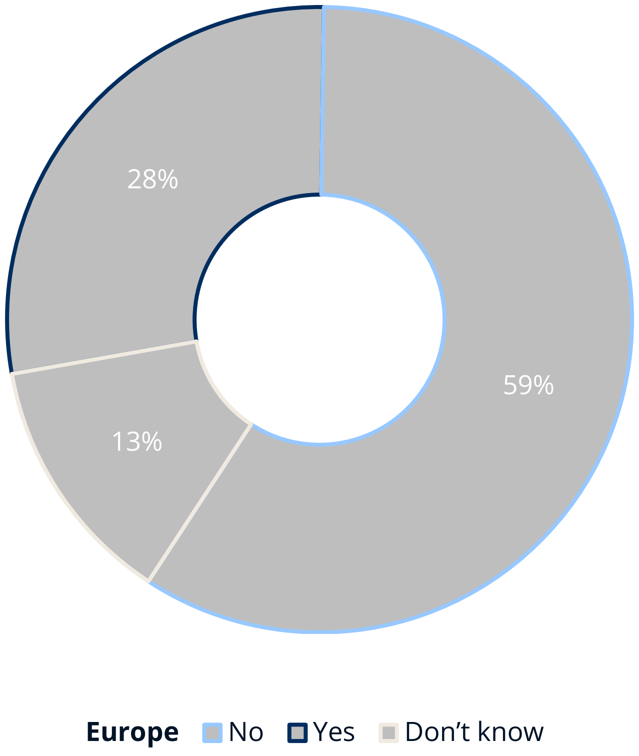
Question Q 31: To what degree would the following options with regards to the use of internet and apps make you consider to switch to another car brand? Another brand that...
Bases: Europe: Total n= 11,011, 18-34 years n= 3,656, 35-44 years n= 2,542, 45 years and older n= 4,813 . **Source:** Statista Q 2023.

REGION I

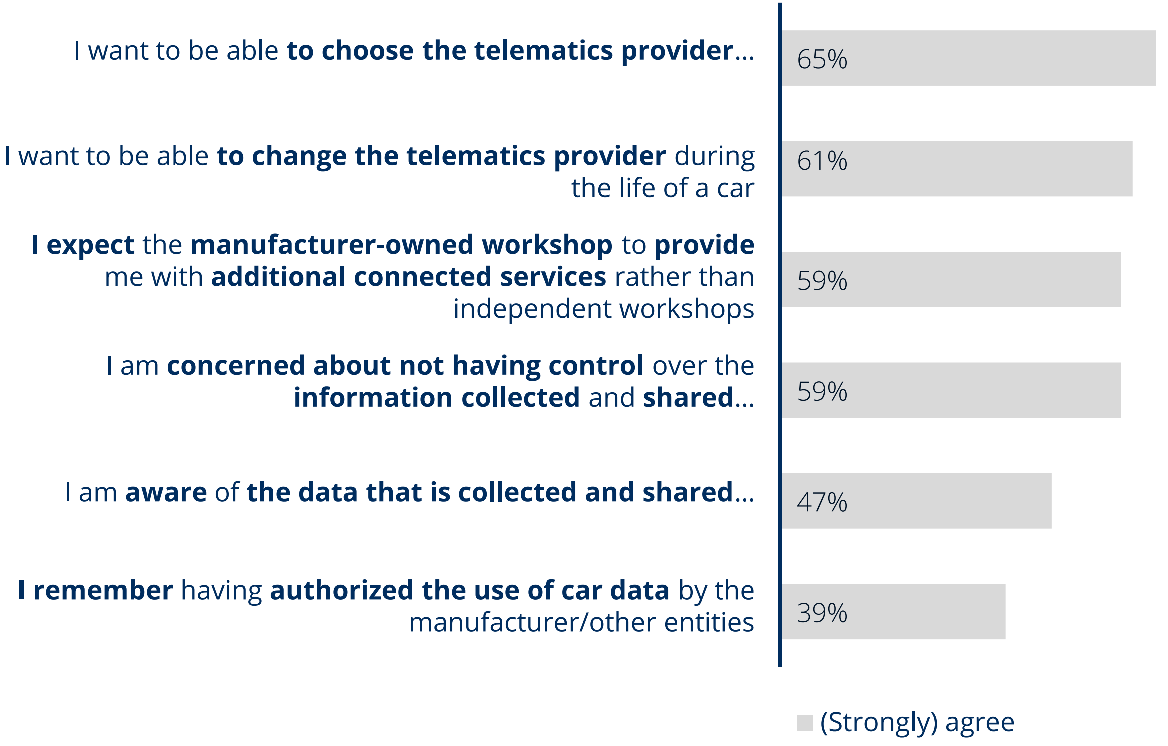
Moderate adoption of telematics overall – control about provider selection and change are most important and expected from the manufacturer

'Connected car' and telematics
All respondents in %, top 2 values for Q35 shown

Is your car „connected"?



How far do you agree with the following statements?

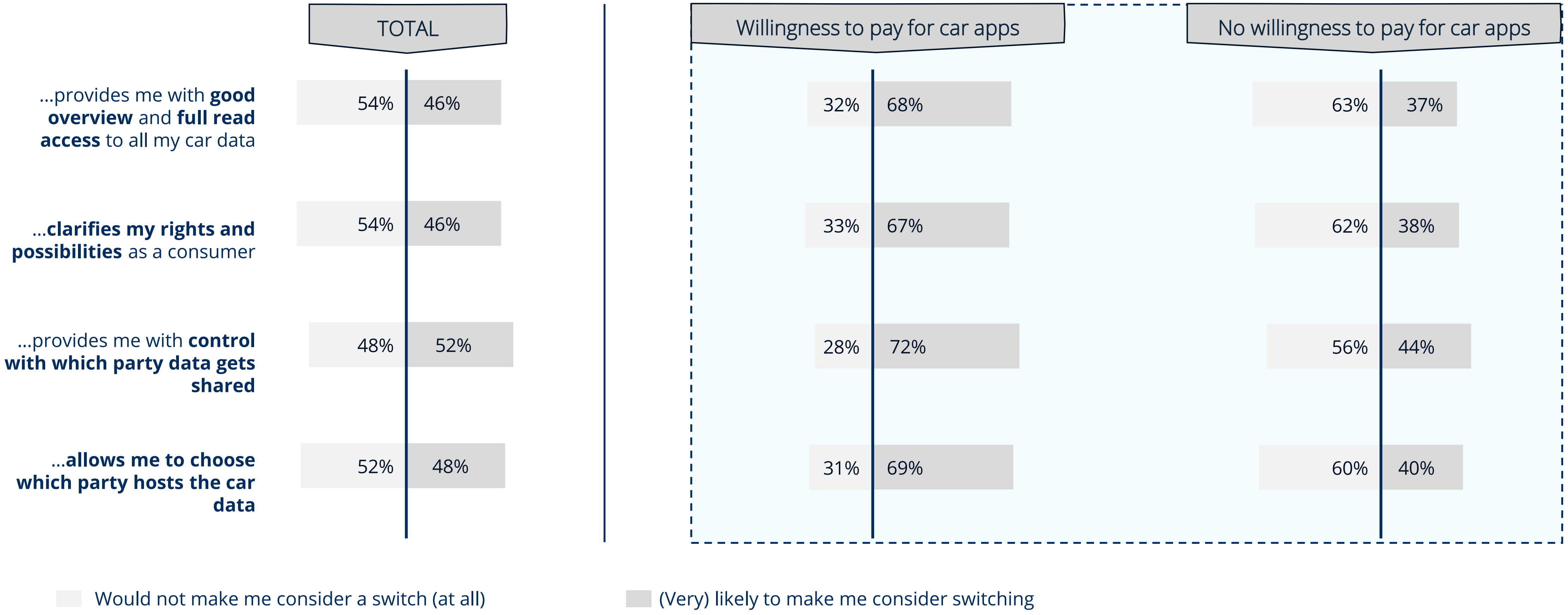


Question Q 34: Is your car "connected" (i.e. uses telematics)?; **Question Q 35:** How far do you agree with the following statements?
Bases: Europe: Total n= 11,011. **Source:** Statista Q 2023.

Major group differences based on willingness to pay: Those open to pay for car apps are much more likely to switch brands based on data sharing options

Willingness to switch the brand based on data sharing options – by willingness to pay for car apps

All respondents in %, top 2 and bottom 2 values shown



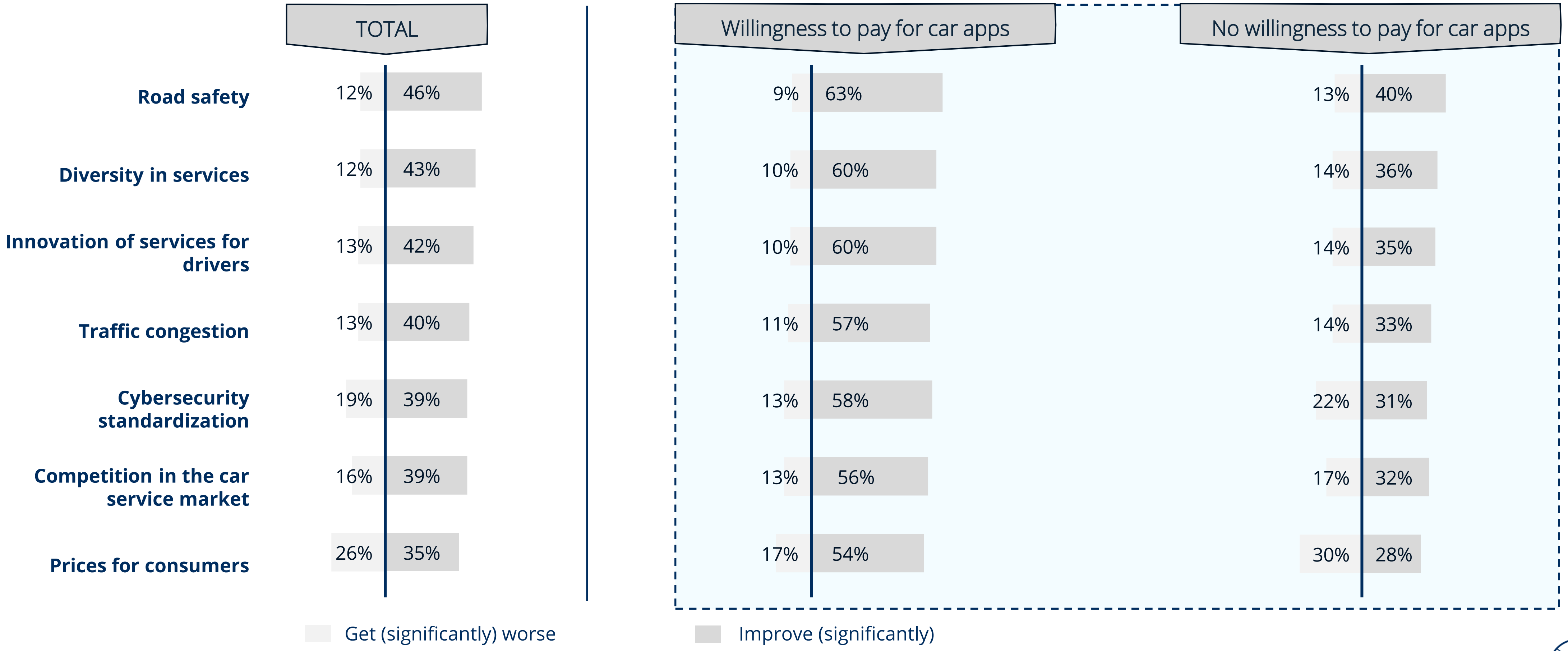
Question Q 38: To what degree would the following options with regards to usage of the car's data make you consider a switch to another car brand? Another brand that…
Bases: Europe: Total n= 11,011, Willingness to pay for car apps yes / no n= 3,179 / 7,832. **Source:** Statista Q 2023.

REGION I

Connectivity & Data

Drivers are optimistic: legislation will promote safety, diversity, and innovation – particularly drivers willing to pay for car apps have faith in the impact

Expectations about legislative regulation impact – by willingness to pay for car apps
All respondents in %, top 2 and bottom 2 values shown



Question Q 39: There is a debate whether legislation should, as it did in banking, impose car manufacturers to grant qualified third parties automated data access when a car owner authorizes this. What results would you expect from such regulations?
Bases: Europe: Total n= 11,011, Willingness to pay for car apps yes / no n= 3,179 / 7,832. **Source:** Statista Q 2023

FIA REGION I

Country Deep Dive

Denmark

Denmark Management Summary

CHANGING SRM NETWORKS: PRICES ARE IMPORTANT AMONG ALL INCOME CLASSES

- Overall, Danish drivers **prefer independent workshops** rather than **manufacturers** as they are perceived **as cheaper but equally competent** – similar to other European countries**.**
- **Car drivers that prefer manufacturers tend to be more loyal** than those servicing their cars at independent workshops. In both groups, a **lower price is the main reason to switch**. Nevertheless, **price comparisons are only relevant to half of the respondents**. Interestingly, the relevancy of a lower price increases with higher income. Different kind of services and accessibility only play a minor role.

RELUCTANCY & INDECISIVENESS AMONG DANISH DRIVERS – MOTOR CLUB MEMBERS ESPECIALLY INTERESTED IN APPS

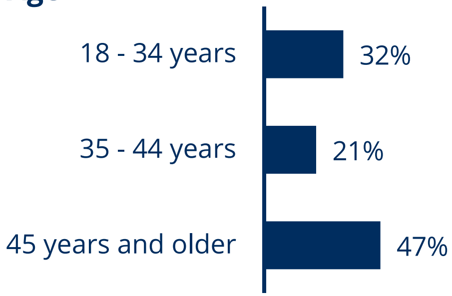
- Nearly **one in three Danes would consider paying for a car app**. However, many **stay undecided in terms of the preferred car app service model,** with a tendency towards preferring free-of-charge apps in exchange for data or display of advertisement.
- Overall, Danish **drivers are less willing to pay** for **connected services** compared to the European benchmark. The most interesting services are real-time navigation and air conditioning.
- Danish drivers tend to **refuse to switch brands based on internet and app usage**. Nonetheless**, motor club members show a higher willingness** – even above the European average.
- Lastly, **motor club members are optimistic and believe in the impact** of legislative regulation on the connectivity market.

1 in 3 Danish drivers already own cars with telematics systems – just as many regular drivers are willing to pay for car apps

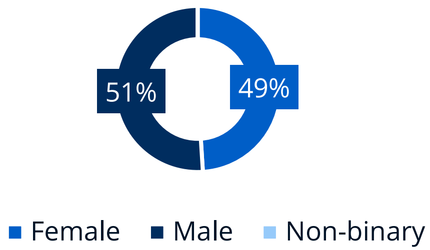
Country Characteristics Denmark

SOCIODEMOGRAPHICS & MEMBERSHIP

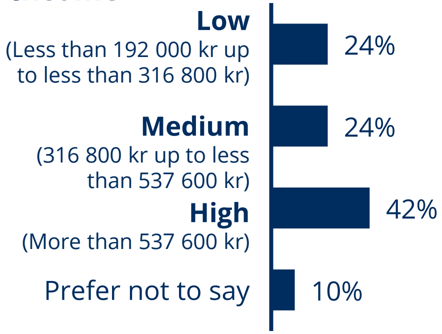
Age



Gender



Income



Motor club Membership

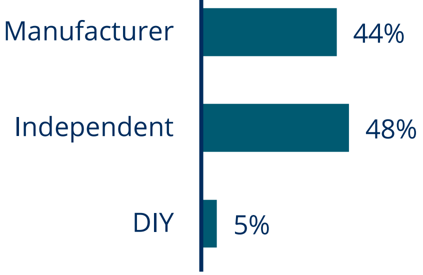
34% Yes

No **66%**

VEHICLE & ATTITUDE

Vehicle Ownership

SMR Preference



Vehicle Age

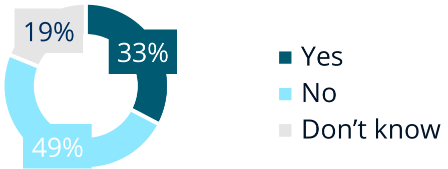
6 years (Median)

Willingness to Pay for Car Apps

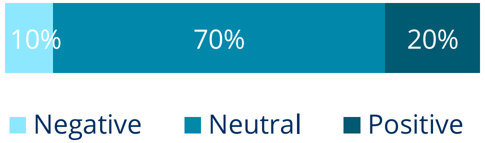
32% Yes

No **68%**

Connected Car



Attitude towards (Legislative) Market Development

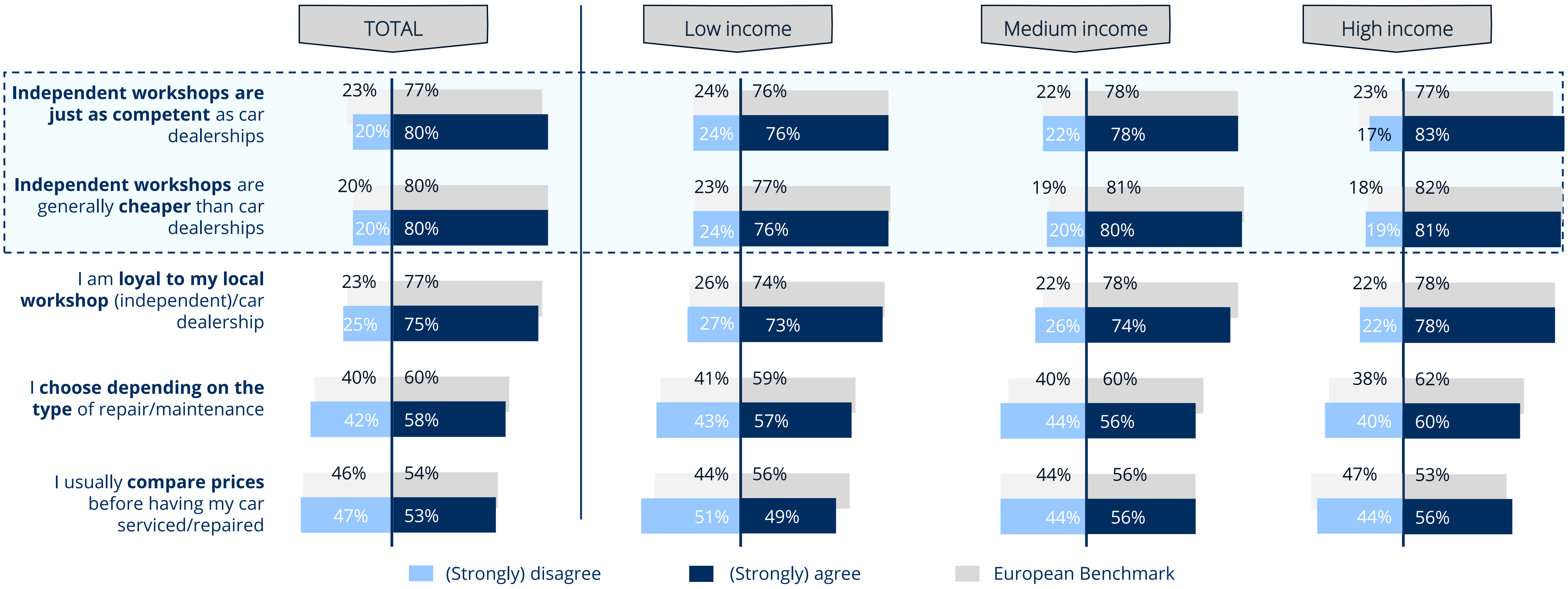


Question Q 1: What is your gender?, **Q 2:** How old are you?, **Q 10:** How old is your car?, **Q 40:** About how high is the annual gross income that your household has at its disposal, before tax and contributions?, **Q 43:** Are you currently member of motorist club?, **Q 11:** How did you acquire your car?, **Q 15:** What is your strategy of selecting a service/workshop for your car when needing regular maintenance?, **Q 28:** Would you consider paying for dedicated apps offered […]?, **Q 34:** Is your car connected?, **Q 39:** There is a debate whether legislation should, […]. What results would you expect from such regulations?
Bases: Denmark: Total n= 1,004. **Source:** Statista Q 2023.

REGION I

Independent workshops considered to deliver the same quality of work for fewer costs – regional ties also play an important role

Top 5 statements about car repair/maintenance – by income
All respondents in %, top 2 and bottom 2 values shown

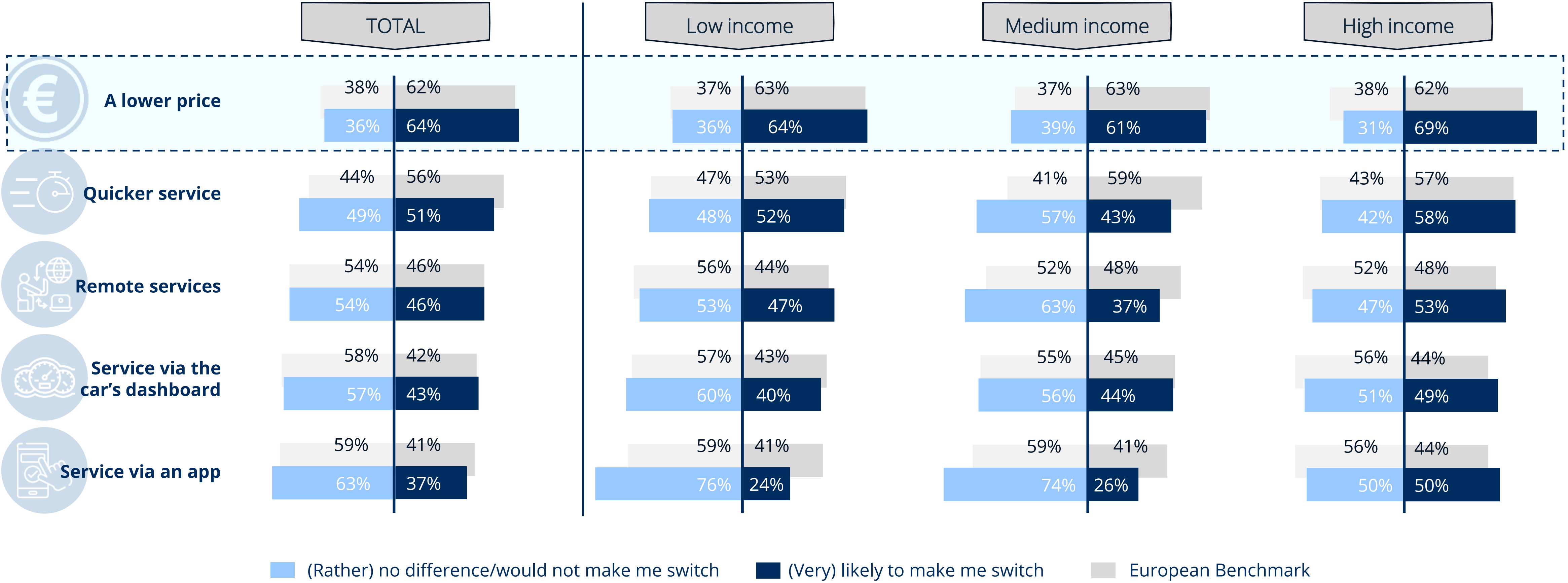


Question Q19: For car repair/maintenance, to what extent would you agree with each of the following statements?
Bases: Denmark: Total n= 1,004, Low n= 241, Medium n= 236, High n= 423; **Europe:** Total n= 11,011, Low n= 2,952, Neutral n= 3,618, High n= 3,522. **Source:** Statista Q 2023.

REGION I

A lower price is the primary reason for Danes to switch from manufacturer to independent workshop across all income classes

Arguments for switching workshop type: **manufacturer to independent** – by income
Respondents who prefer manufacturer networks/workshops in %, top 2 and bottom 2 values shown

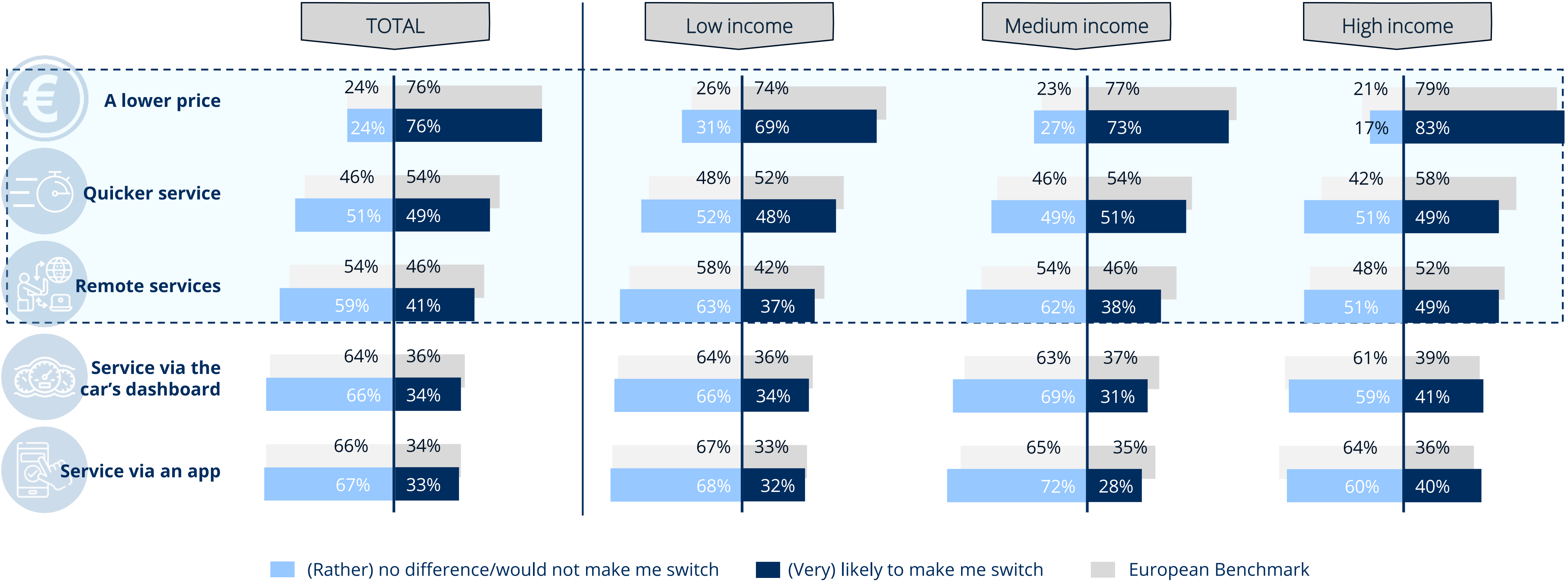


Question Q 20.1: How likely are you to switch to an independent workshop in the following situations? If the independent workshop...
Bases: Denmark: Total n= 437, Low n= 91, Medium n= 93, High n= 217; **Europe:** Total n= 4,575, Low n= 1,007, Medium n= 1,455, High n= 1,767. **Source:** Statista Q 2023.

FIA REGION I

Lower prices would also induce switches to manufacturer WSs – quicker and remote services are relevant, despite lagging behind the European benchmark

Arguments for switching workshop type: independent to manufacturer – by income
Respondents who prefer independent networks/workshops in %, top 2 and bottom 2 values shown



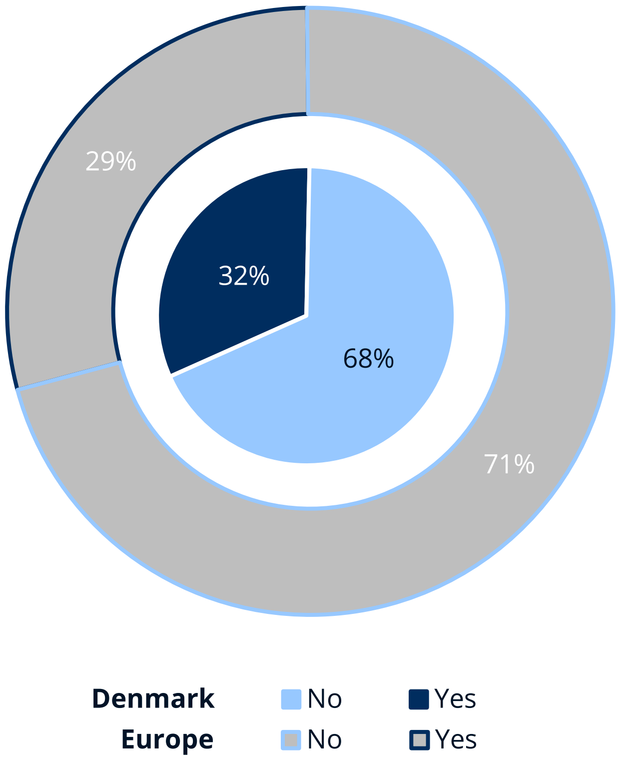
Question Q 20.2: How likely are you to switch to a manufacturer workshop in the following situations? If the manufacturer workshop….
Bases: Denmark: Total n= 485, Low income n= 128, Medium income n= 125 , High income n= 181; **Europe:** Total n= 5,776, Low income n= 1,708, Medium income n= 1,973, High income n= 1,614. **Source:** Statista Q 2023

FIA REGION I

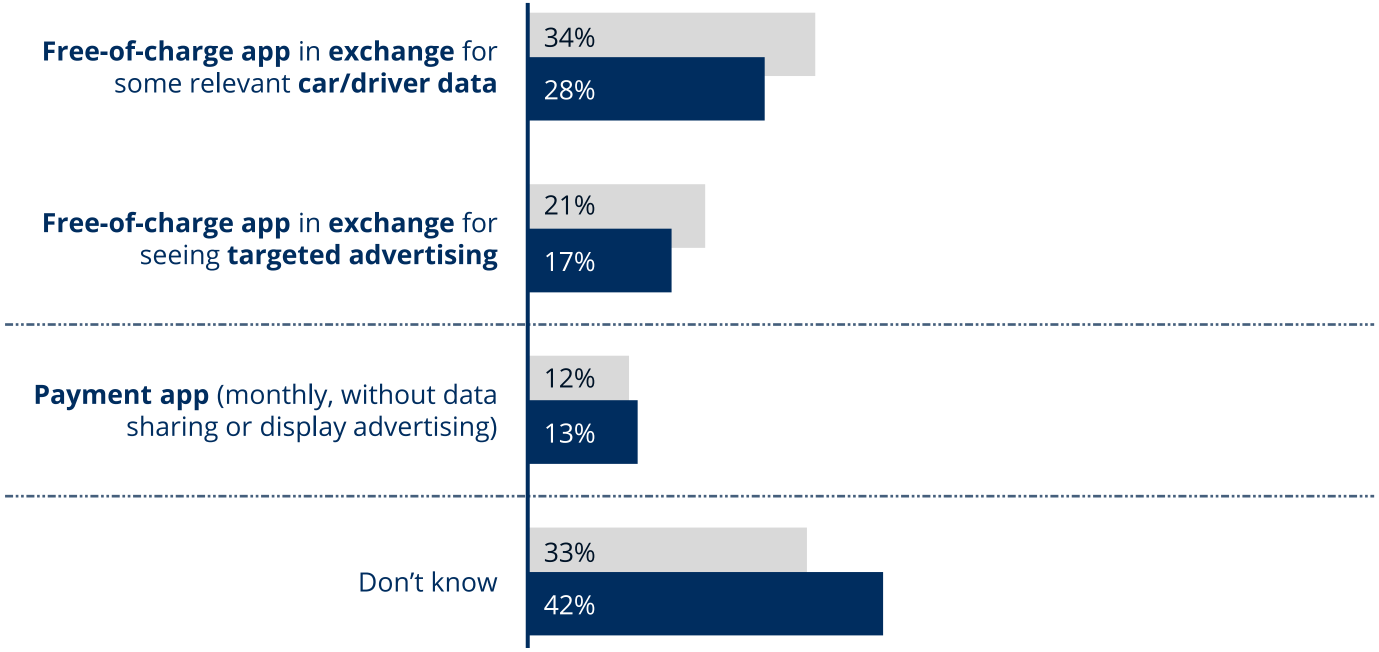
Willingness to pay is slightly above benchmark – those that aren't open to paying are uncertain about a better app service model, though

Considering paying for dedicated car apps and preferred service model
All respondents in %

Considering paying for car apps



Preferred car app service model

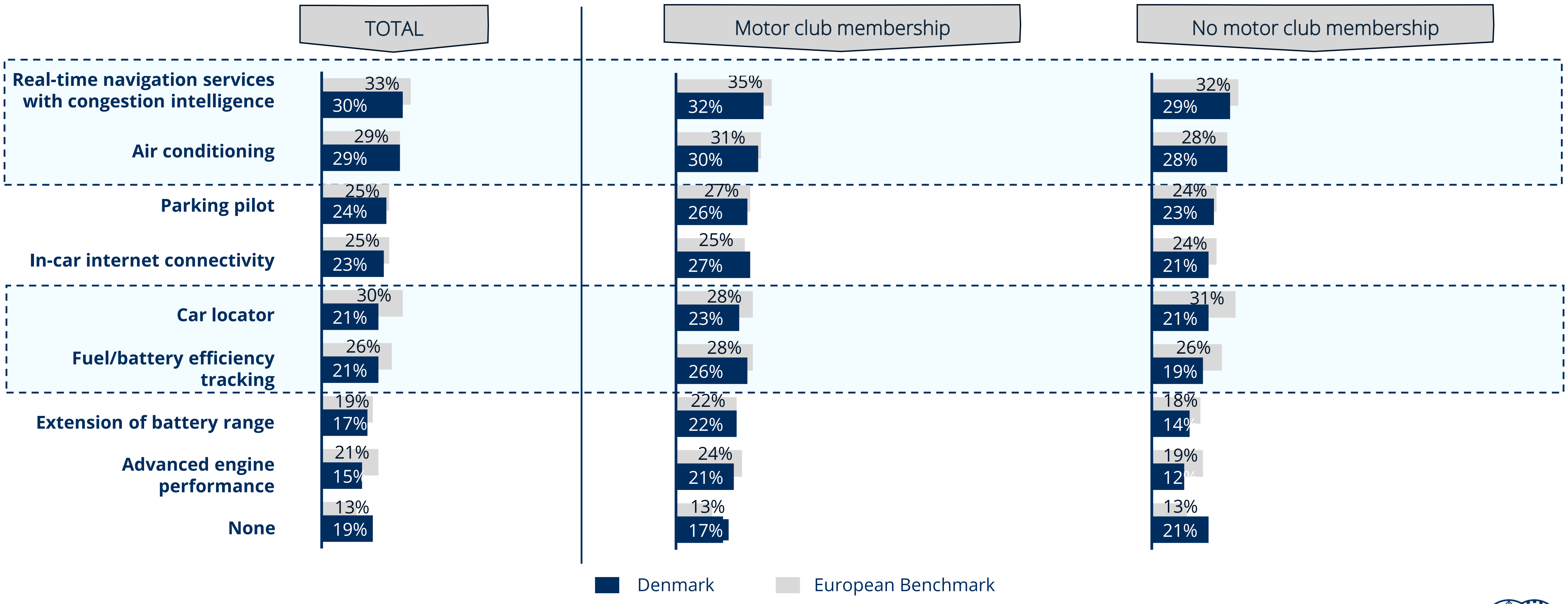


Question Q 28: Would you consider paying for dedicated apps offered exclusively for the cars display/screen?; **Question Q 29:** Dedicated car apps can be offered in various ways: Which of the following service models do you prefer?
Bases: Denmark: Total n= 1,004; **Europe:** Total n= 11,011. **Source:** Statista Q 2023.

REGION I

Real-time navigation and air conditioning are the most appealing services; car locating, and efficiency tracking are below benchmark

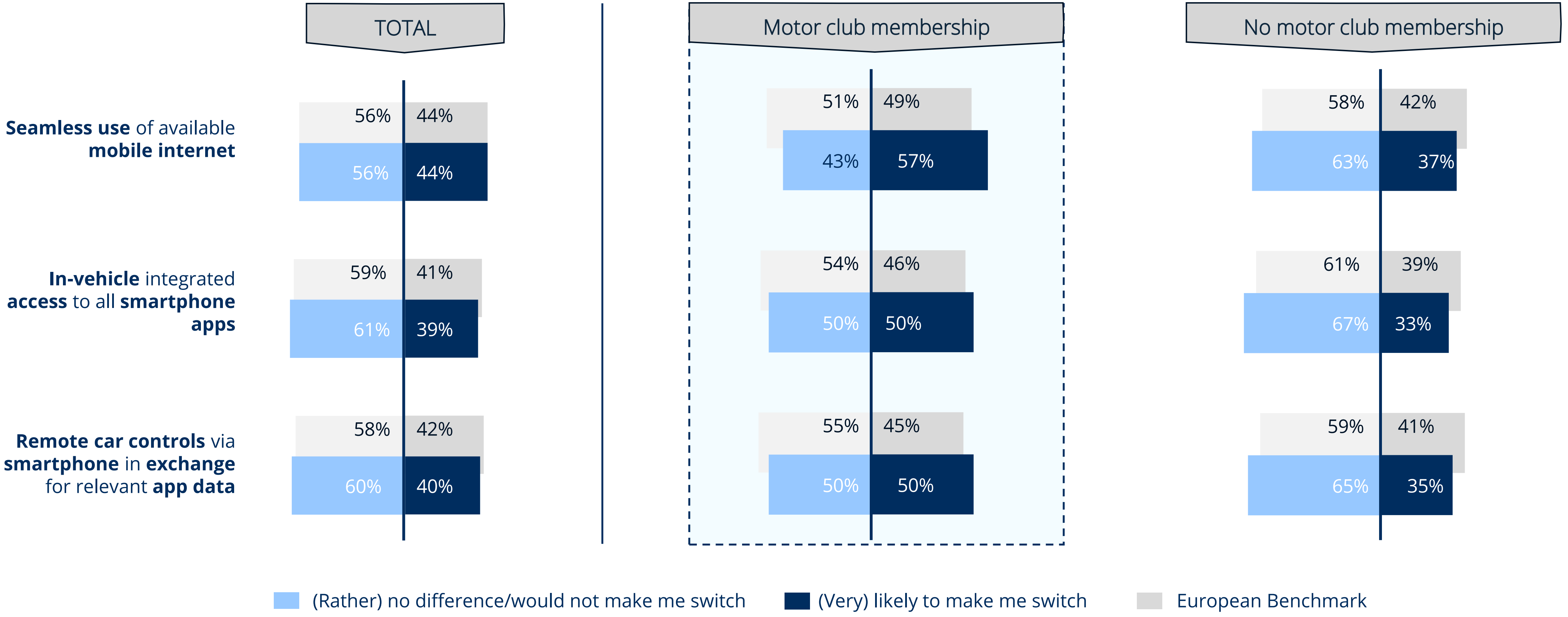
Services in a ‘connected car’ respondents are willing to pay for – by motor club membership
All respondents in %



Question Q 32: For which of the following services in a ‘connected car’, would you generally be willing to pay a monthly amount?
Bases: Denmark: Total n= 1,004, motor club membership yes / no n= 341 / 663 ; **Europe:** Total n= 11,011, motor club membership yes / no n= 3,037 / 7,974. **Source:** Statista Q 2023.

Possibility to use internet and in-vehicle apps are more likely to make motor club members switch to a different car brand than non-club-members

Willingness to switch the brand based on internet and app usage – by motor club membership
All respondents in %, top 2 and bottom 2 values shown



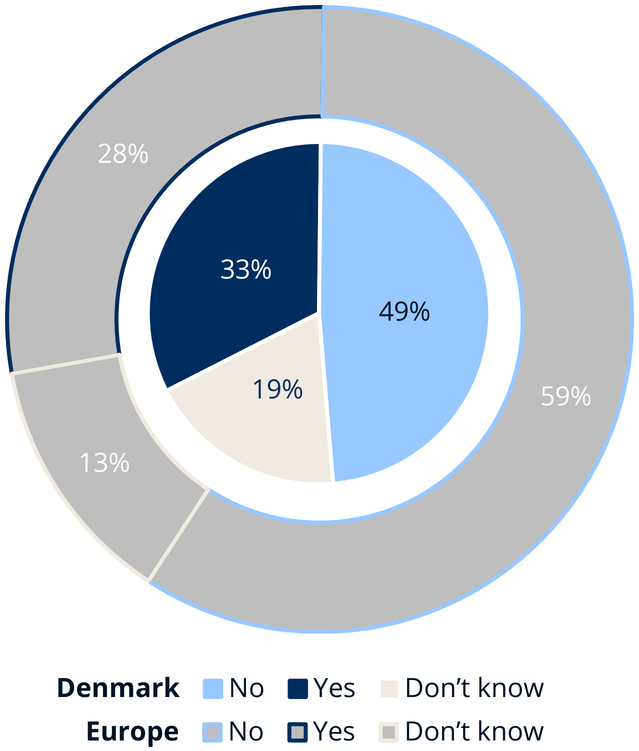
Question Q 31: To what degree would the following options with regards to the use of internet and apps make you consider to switch to another car brand? Another brand that…
Bases: Denmark: Total n= 1,004, motor club membership yes / no n= 341 / 663, ; **Europe:** Total n= 11,011, motor club membership yes / no n= 3,037 / 7,974. **Source:** Statista Q 2023.

FIA REGION I

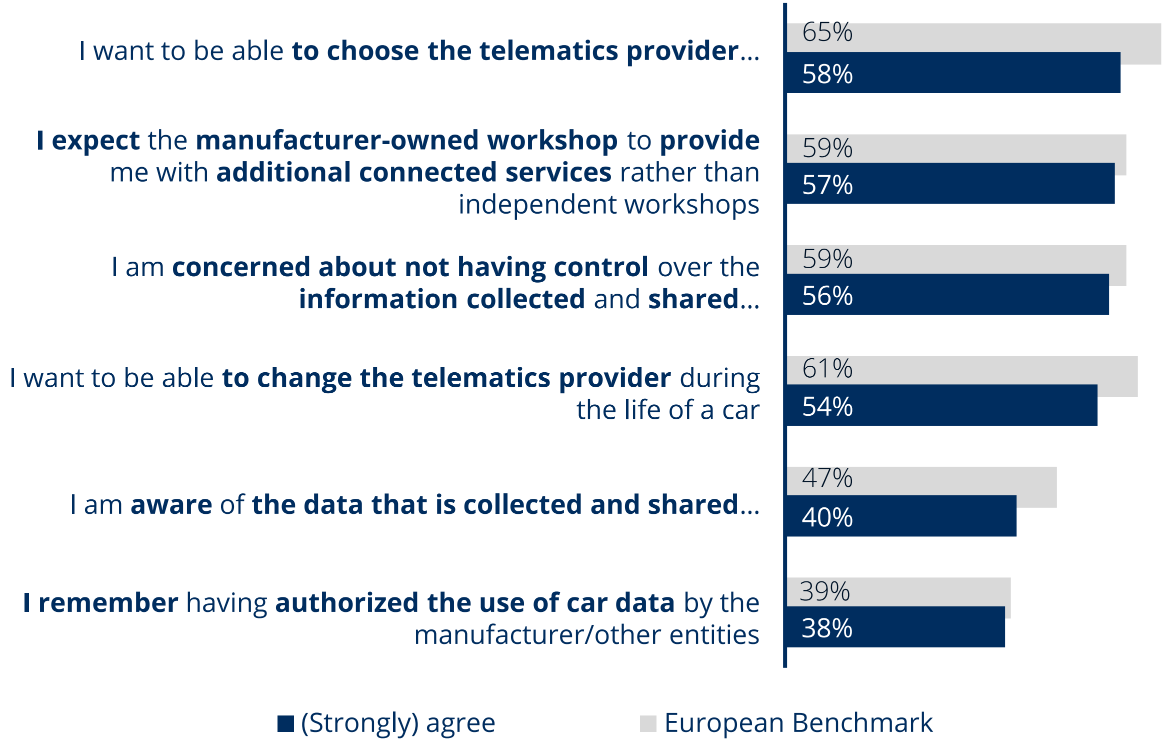
The adoption of telematics in Denmark is ahead of the European benchmark – control about provider selection and the collected data are most important

'Connected car' and telematics
All respondents in % top 2 values for Q35 shown

Is your car „connected"?



How far do you agree with the following statements?

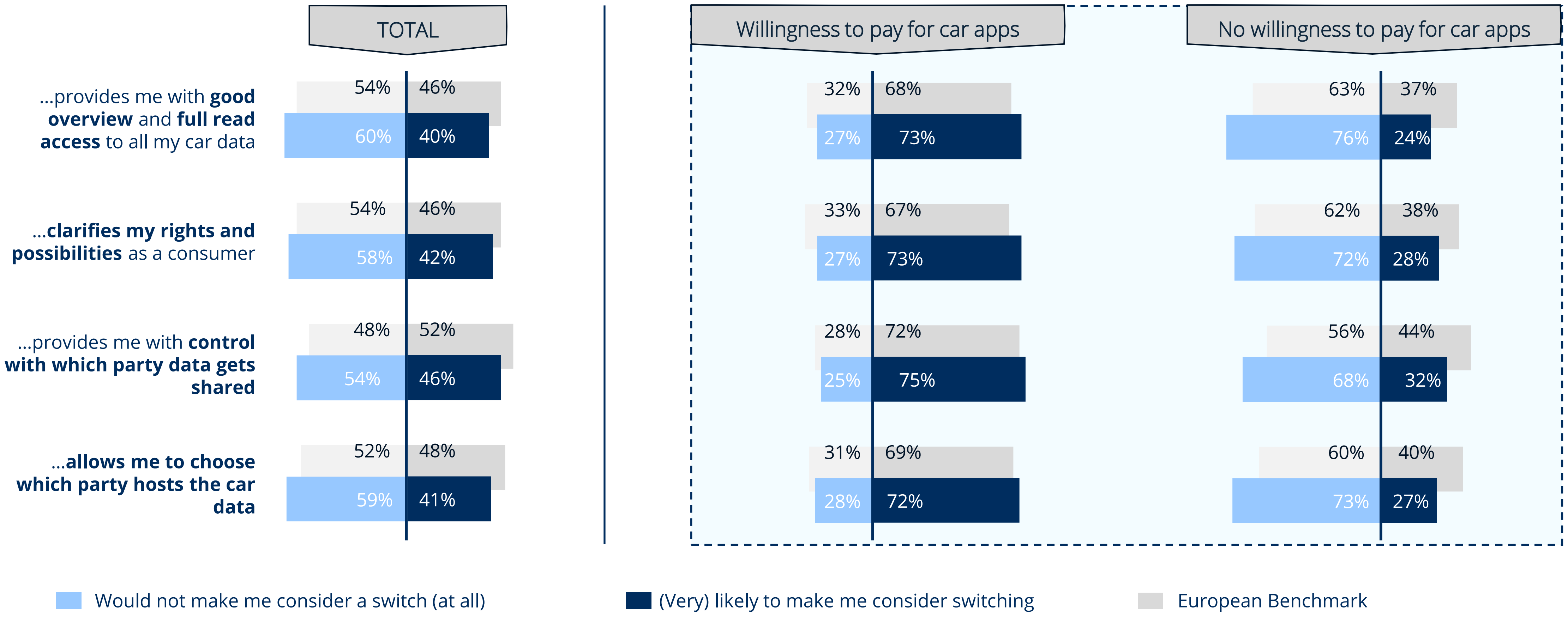


Question Q 34: Is your car "connected" (i.e. uses telematics)?; **Question Q 35:** How far do you agree with the following statements?
Bases: Denmark: Total n= 1,004; **Europe:** Total n= 11,011. **Source:** Statista Q 2023.

FIA REGION I

Large group differences based on willingness to pay: Those open to pay for car apps are much more likely to switch brands based on data sharing options

Willingness to switch the brand based on data sharing options – by willingness to pay for car apps
All respondents in %, top 2 and bottom 2 values shown

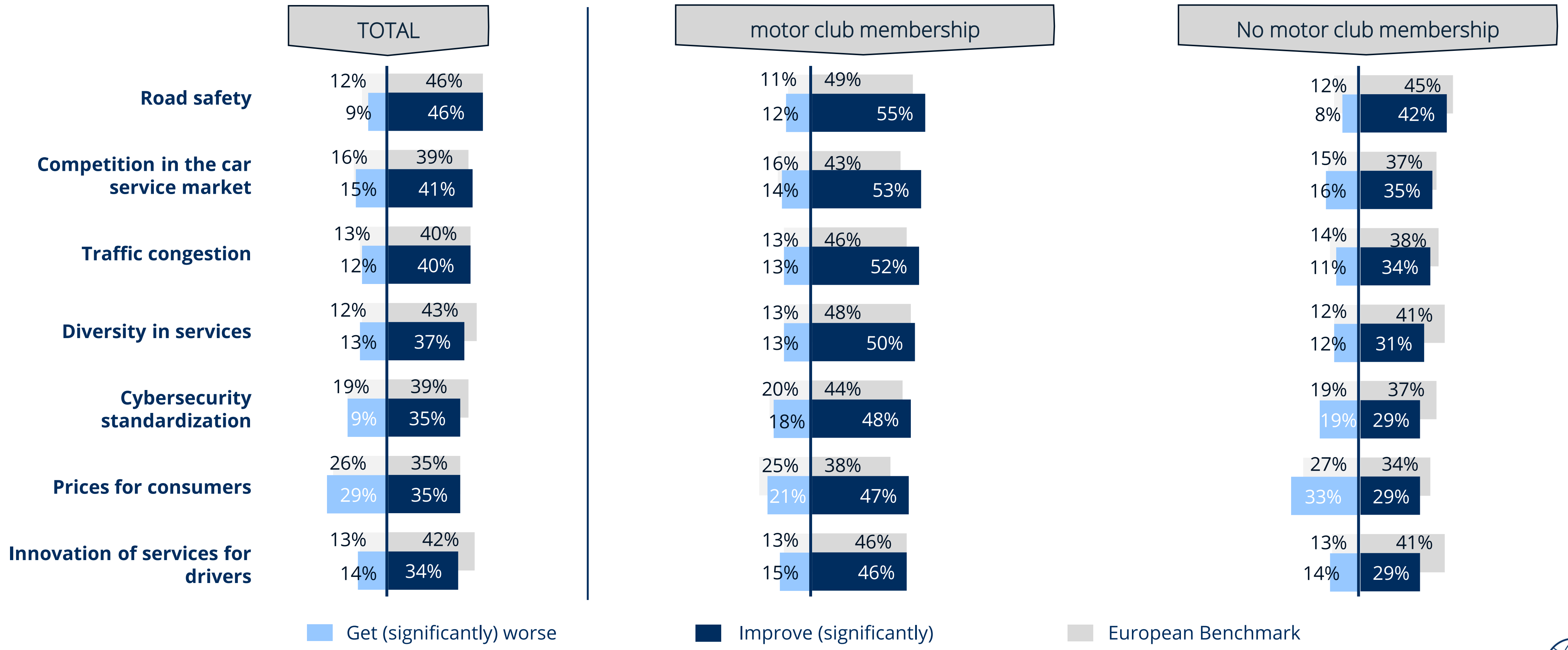


Question Q 38: To what degree would the following options with regards to usage of the car's data make you consider a switch to another car brand? Another brand that...
Bases: Denmark: Total n= 1,004, Willingness to pay for car apps yes / no n= 318 / 686, ; **Europe:** Total n= 11,011, Willingness to pay for car apps yes / no n= 3,179 / 7,832. **Source:** Statista Q 2023.

FIA REGION I

In line with the European benchmark: Danish drivers expect improvements through new data legislation across all categories

Expectations about legislative regulation impact – by motor club membership
All respondents in %, top 2 and bottom 2 values shown



Question Q 39: There is a debate whether legislation should, as it did in banking, impose car manufacturers to grant qualified third parties automated data access when a car owner authorizes this. What results would you expect from such regulations?
Bases: Denmark: Total n= 1,004, motor club membership yes / no n= 341 / 663; **Europe:** Total n= 11,011, motor club membership yes / no n= 3,037 / 7,974. **Source:** Statista Q 2023

FIA REGION I

Country Deep Dive
Finland

Finland Management Summary

FINNISH INDEPENDENT NETWORKS HAVE A GOOD IMAGE AMONG DRIVERS – BUT THOSE VISITING MANUFACTURER NETWORKS ARE OFTEN UNWILLING TO SWITCH

- Finnish drivers generally prefer **independent workshop networks** over those that are run by manufacturers. While **independent workshops** are perceived to **be equally competent** and **cheaper,** many drivers base their decision on **which sort of supplier to choose** on the type of maintenance/repair they require.
- However, **drivers usually visiting manufacturers** for their SMR **are loyal** to their workshop: more than half of them would consider switching to independent networks if prices are lower and services are quicker. With only a third of drivers comparing prices before visiting a shop, a switch will be unlikely to happen in most cases.
- **Finnish drivers servicing their cars at independent workshops** are **not as loyal** – four in five would switch to a manufacturer for a lower price.

FINNISH DRIVERS ARE UNSURE: PAYING FOR CAR APPS IS NOT A CONVINCING OPTION – BUT GIVING UP DATA ISN'T AS WELL

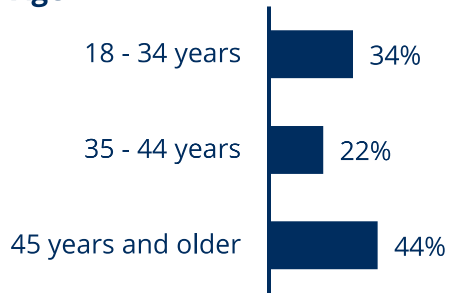
- Paying for a dedicated car app is not overly popular in Finland, with only one in six drivers considering such a solution. In terms of service model, **free-of-charge apps** are the **most popular**, but 40% are still **undecided on which model they'd prefer.**
- Finish drivers would not consider **switching their preferred car brand based on the accessibility of special connected features** – mobile internet, in-vehicle access, and remote control would all only make about a third of drivers looking out for a new brand.
- One in four in Finland drives a connected car, just as much as the European Benchmark. And just as in the rest of Europe, about half of Finnish drivers would **consider switching brands in order to get control over their data.**
- Finally, drivers **expect diversity, innovation, and competition** through **regulations**, but not necessarily better prices or standardization.

Motor club membership is rather uncommon in Finland – Drivers generally prefer independent networks over manufacturer ones

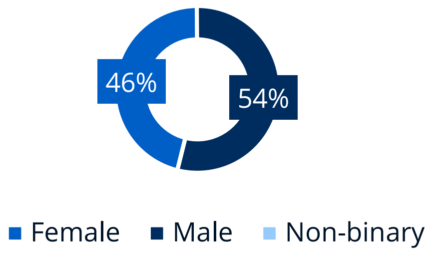
Country Characteristics Finland

SOCIODEMOGRAPHICS & MEMBERSHIP

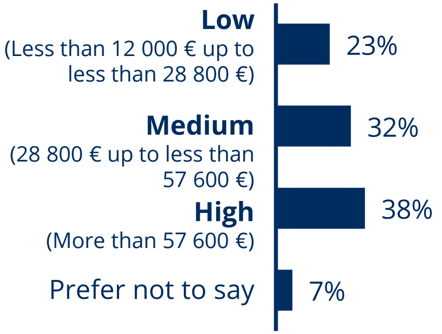
Age



Gender



Income



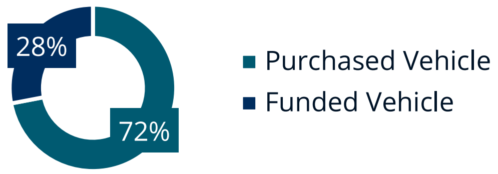
Motor club Membership

12% Yes

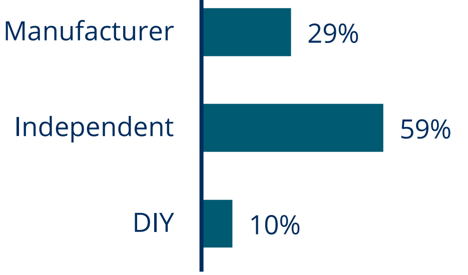
No **88%**

VEHICLE & ATTITUDE

Vehicle Ownership



SMR Preference



Vehicle Age

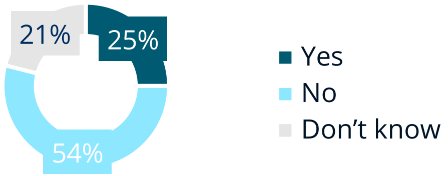
10 years (Median)

Willingness to Pay for Car Apps

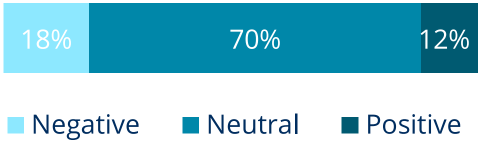
16% Yes

No **84%**

Connected Car



Attitude towards (Legislative) Market Development

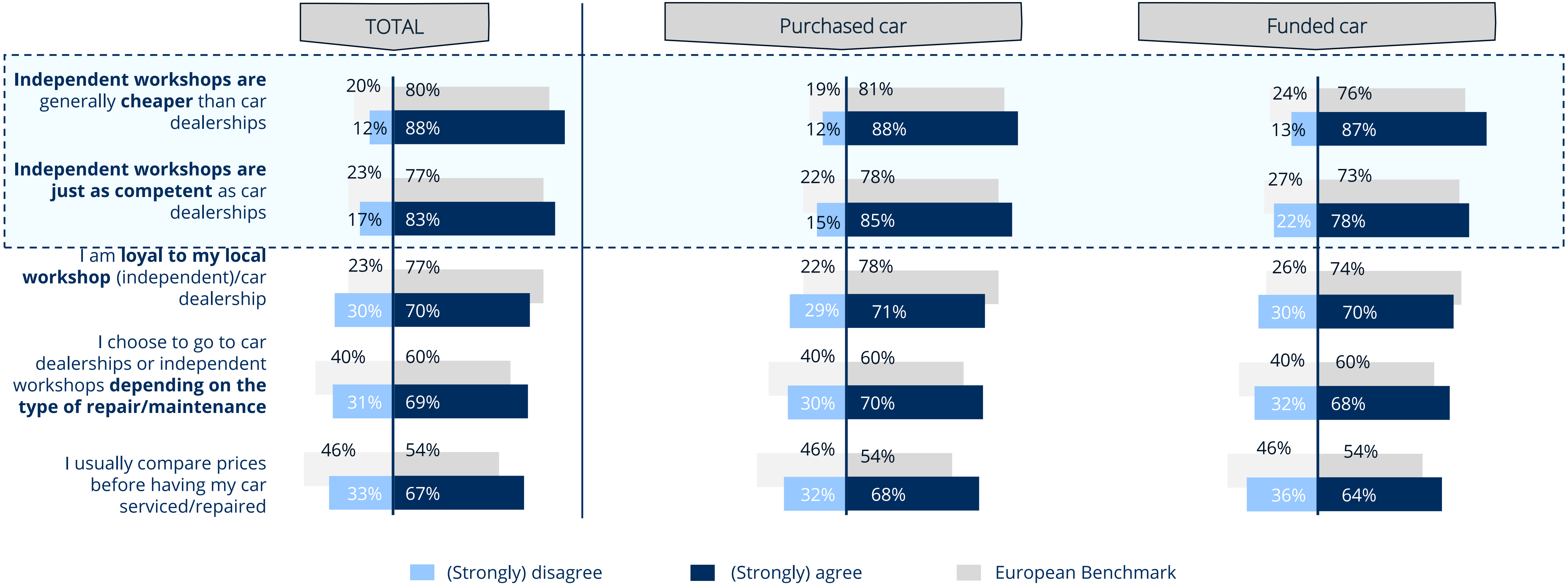


Question Q 1: What is your gender?, **Q 2:** How old are you?, **Q 10:** How old is your car?, **Q 40:** About how high is the annual gross income that your household has at its disposal, before tax and contributions?, **Q 43:** Are you currently member of motorist club?, **Q 11:** How did you acquire your car?, **Q 15:** What is your strategy of selecting a service/workshop for your car when needing regular maintenance?, **Q 28:** Would you consider paying for dedicated apps offered […]?, **Q 34:** Is your car connected?, **Q 39:** There is a debate whether legislation should, […]. What results would you expect from such regulations?
Bases: Finland: Total n= 1,000. **Source:** Statista Q 2023.

REGION I

Particularly a high share of Finnish drivers perceive independent WS as cheaper but equally as competent as car dealerships

Top 5 statements about car repair/maintenance – by vehicle ownership
All respondents in %, top 2 and bottom 2 values shown

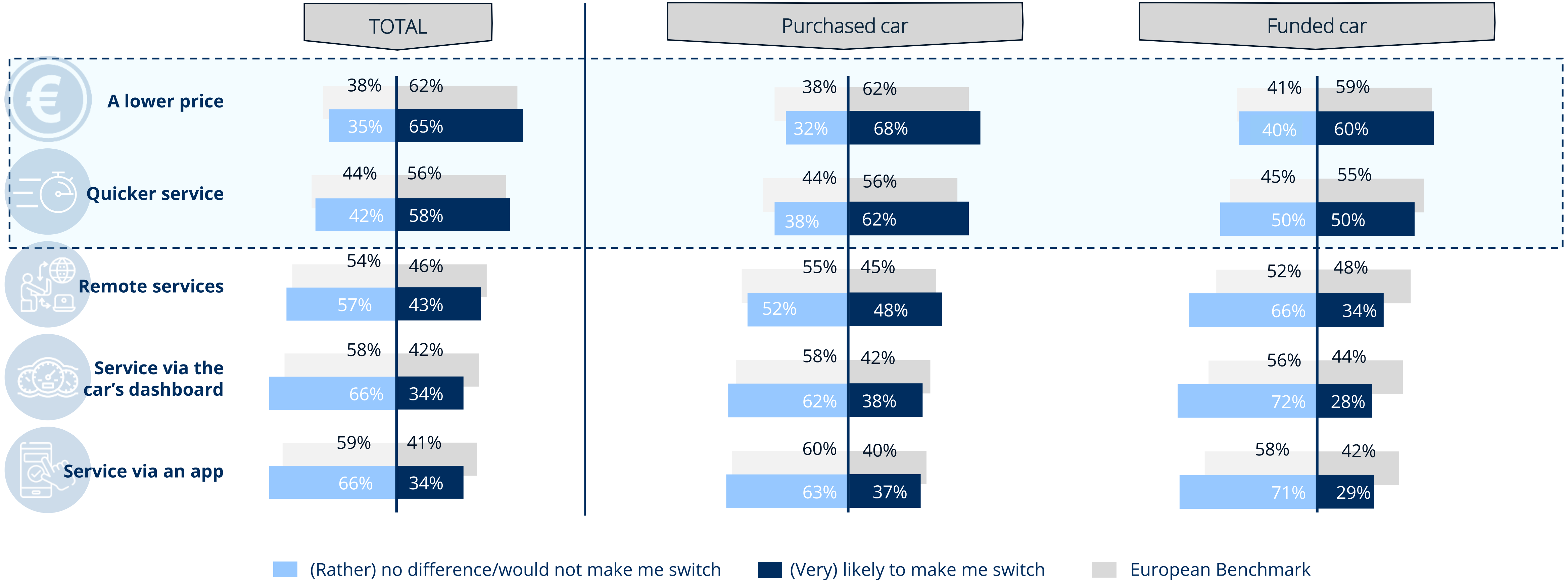


Question Q19: For car repair/maintenance, to what extent would you agree with each of the following statements?
Bases: Finland: Total n= 1,000, Purchased car n= 721, Funded car n= 279; **Europe:** Total n= 11,011, Purchased car n= 8,590, Funded car n= 2,421. **Source:** Statista Q 2023.

REGION I

Close to the European benchmark: Only a lower price and faster service could convince more than 50% to switch to an independent WS

Arguments for switching workshop type: **manufacturer to independent** – by vehicle ownership
Respondents who prefer manufacturer networks/workshops in %, top 2 and bottom 2 values shown

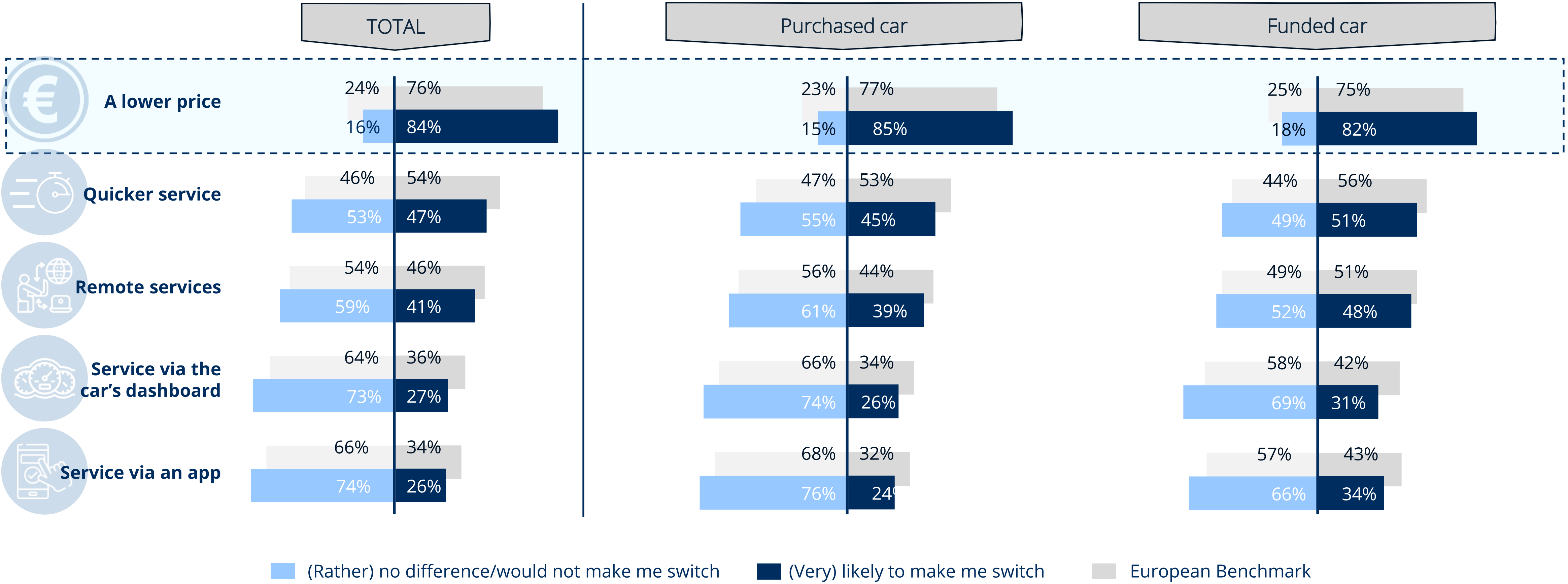


Question Q 20.1: How likely are you to switch to an independent workshop in the following situations? If the independent workshop...
Bases: Finland: Total n= 289, Purchased car n= 188, Funded car n= 101; **Europe:** Total n= 4,575, Purchased car n=3,394, Funded car n= 1,181. **Source:** Statista Q 2023.

FIA REGION I

A lower price would be a reason for a large majority of Finnish drivers to switch to a manufacturer WS – even more than other European countries

Arguments for switching workshop type: **independent to manufacturer** – by vehicle ownership
Respondents who prefer independent networks/workshops in %, top 2 and bottom 2 values shown



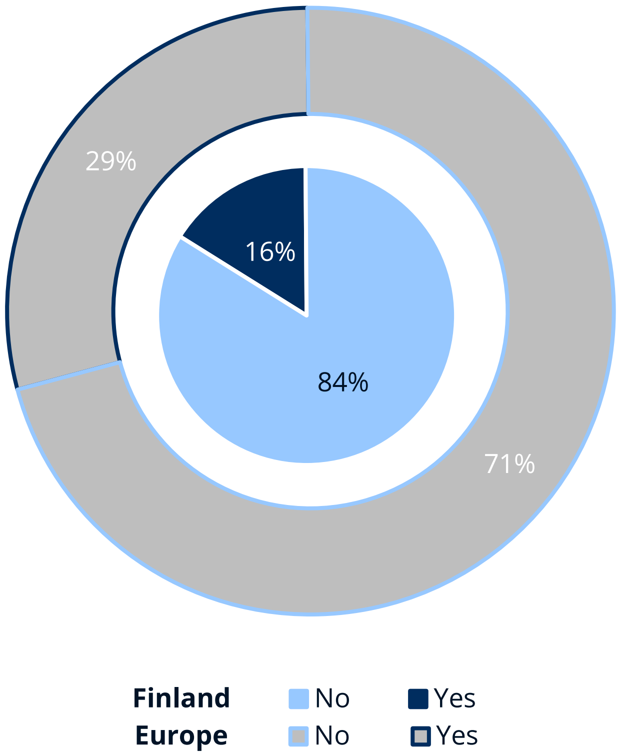
Question Q 20.2: How likely are you to switch to a manufacturer workshop in the following situations? If the manufacturer workshop....
Bases: Finland: Total n= 589 , Purchased car n= 433, Funded car n= 156; **Europe:** Total n= 5,776, Purchased car n=4,642, Funded car n= 1,134. **Source:** Statista Q 2023

FIA REGION I

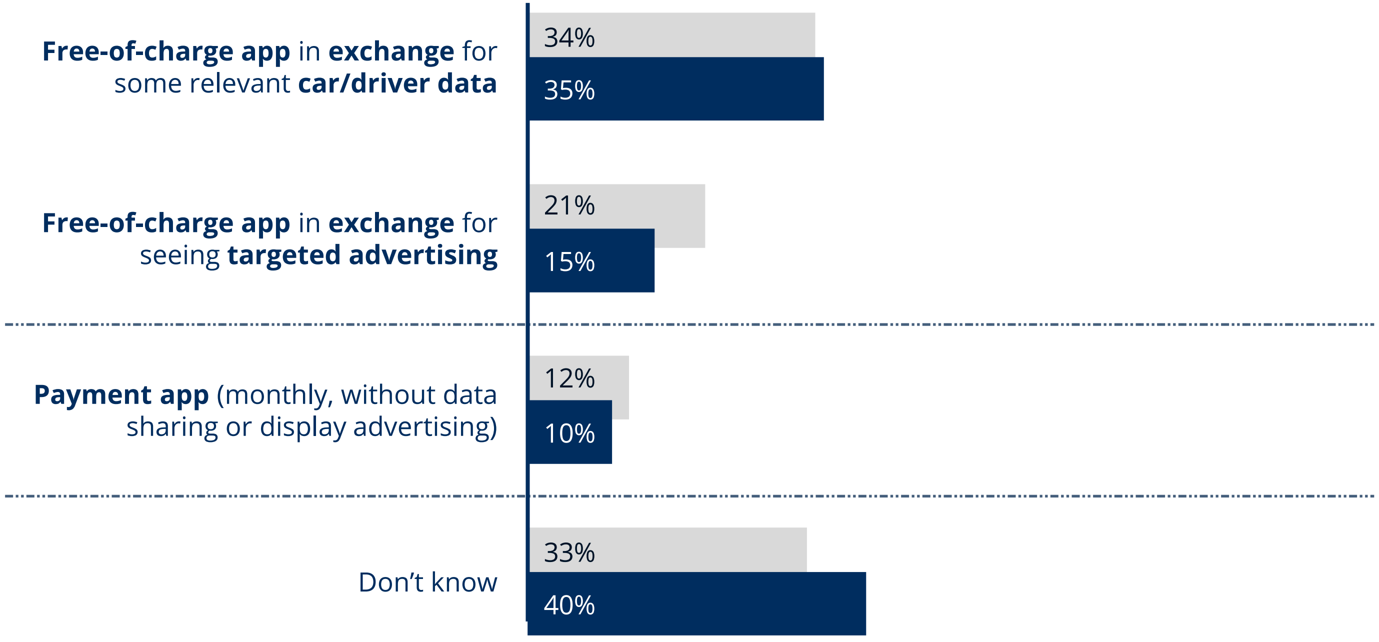
Willingness to pay for apps is clearly below European average – Preferred service model: Free-of-charge in exchange for data, but many are still undecided

Considering paying for dedicated car apps and preferred service model
All respondents in %

Considering paying for car apps



Preferred car app service model

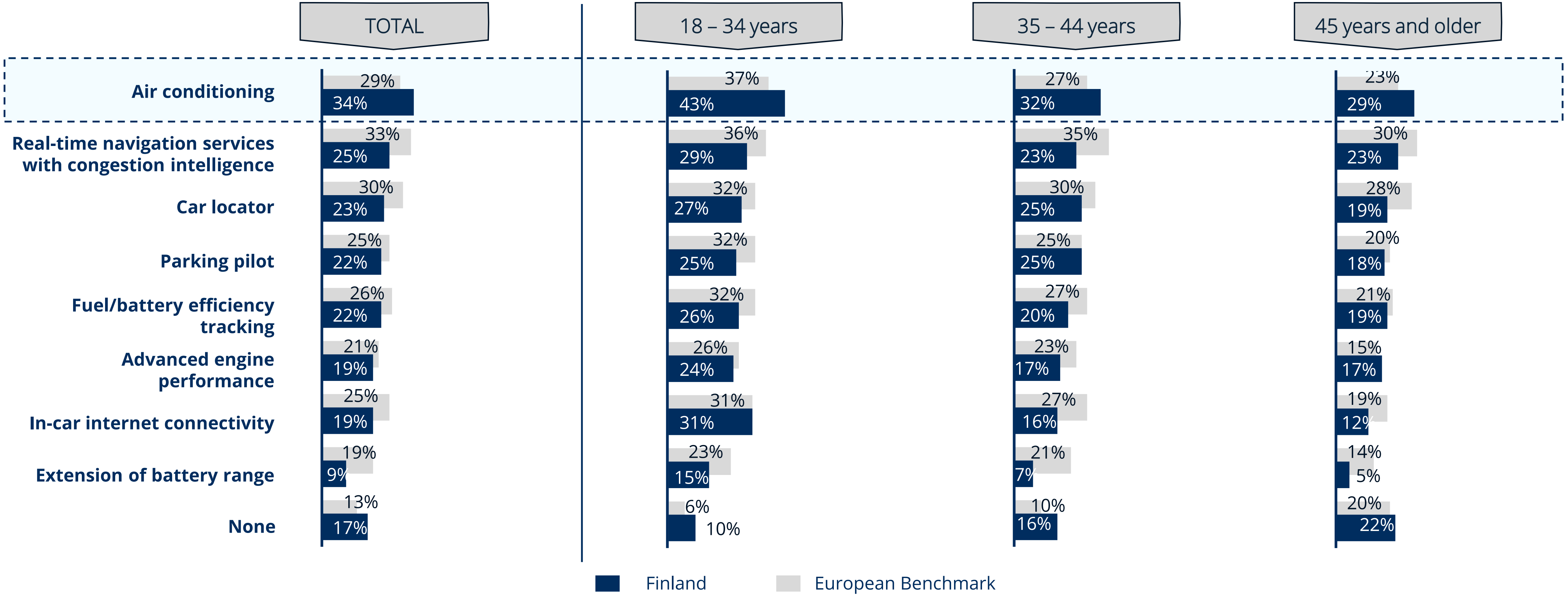


Question Q 28: Would you consider paying for dedicated apps offered exclusively for the cars display/screen?; **Question Q 29:** Dedicated car apps can be offered in various ways: Which of the following service models do you prefer?
Bases: Finland: Total n= 1,000; **Europe:** Total n= 11,011. **Source:** Statista Q 2023.

FIA REGION I

The younger generation is more willing to pay for connected car services – Air conditioning is most sought-after and above European average in all age groups

Services in a 'connected car' respondents are willing to pay for – by age
All respondents in %

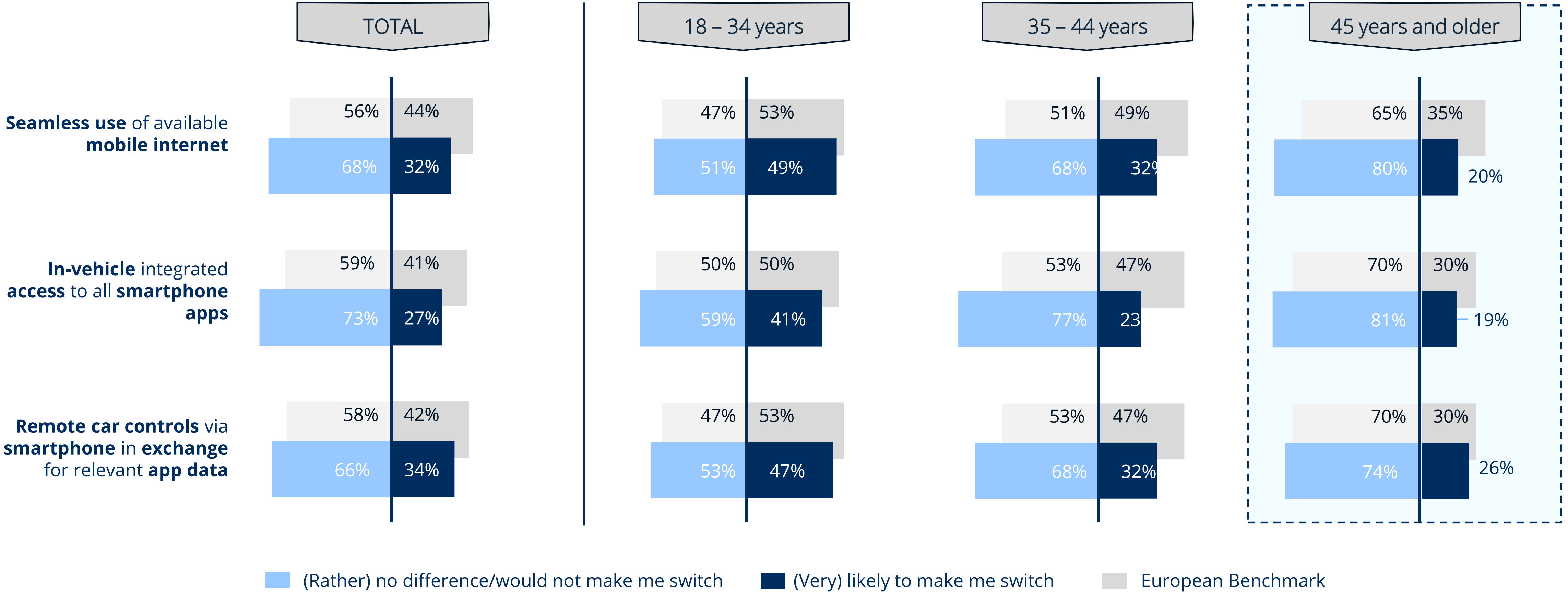


Question Q 32: For which of the following services in a 'connected car', would you generally be willing to pay a monthly amount?
Bases: Finland: Total n= 1,000, 18-34 years n= 335, 35-44 years n= 224, 45 years and older n= 441 ; **Europe:** Total n= 11,011, 18-34 years n= 3,656, 35-44 years n= 2,542, 45 years and older n= 4,813 . **Source:** Statista Q 2023

REGION I

Compared to the European average, the willingness to switch the brand is lower across all age groups – Those aged 45+ are especially loyal

Willingness to switch the brand based on internet and app usage – by age
All respondents in %, top 2 and bottom 2 values shown



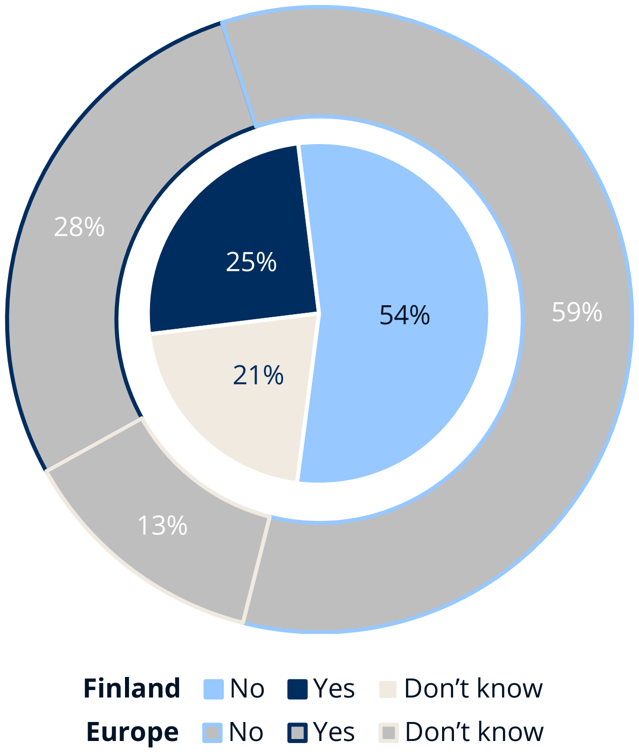
Question Q 31: To what degree would the following options with regards to the use of internet and apps make you consider to switch to another car brand? Another brand that...
Bases: Finland: Total n= 1,000, 18-34 years n= 335, 35-44 years n= 224, 45 years and older n= 441 ; **Europe:** Total n= 11,011, 18-34 years n= 3,656, 35-44 years n= 2,542, 45 years and older n= 4,813 . **Source:** Statista Q 2023.

REGION I

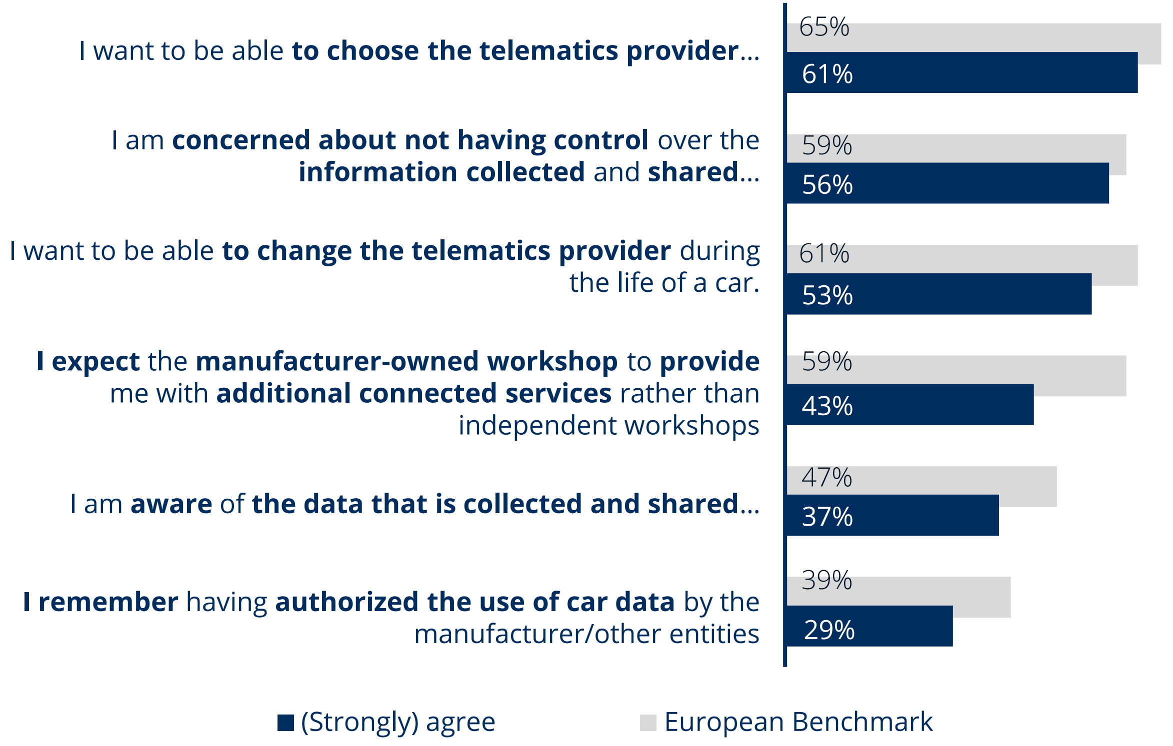
One in four cars in Finland is connected - Like the European average, choosing the telematics provider is particularly important to Finns

'Connected car' and telematics
All respondents in % top 2 values for Q35 shown

Is your car „connected"?



How far do you agree with the following statements?

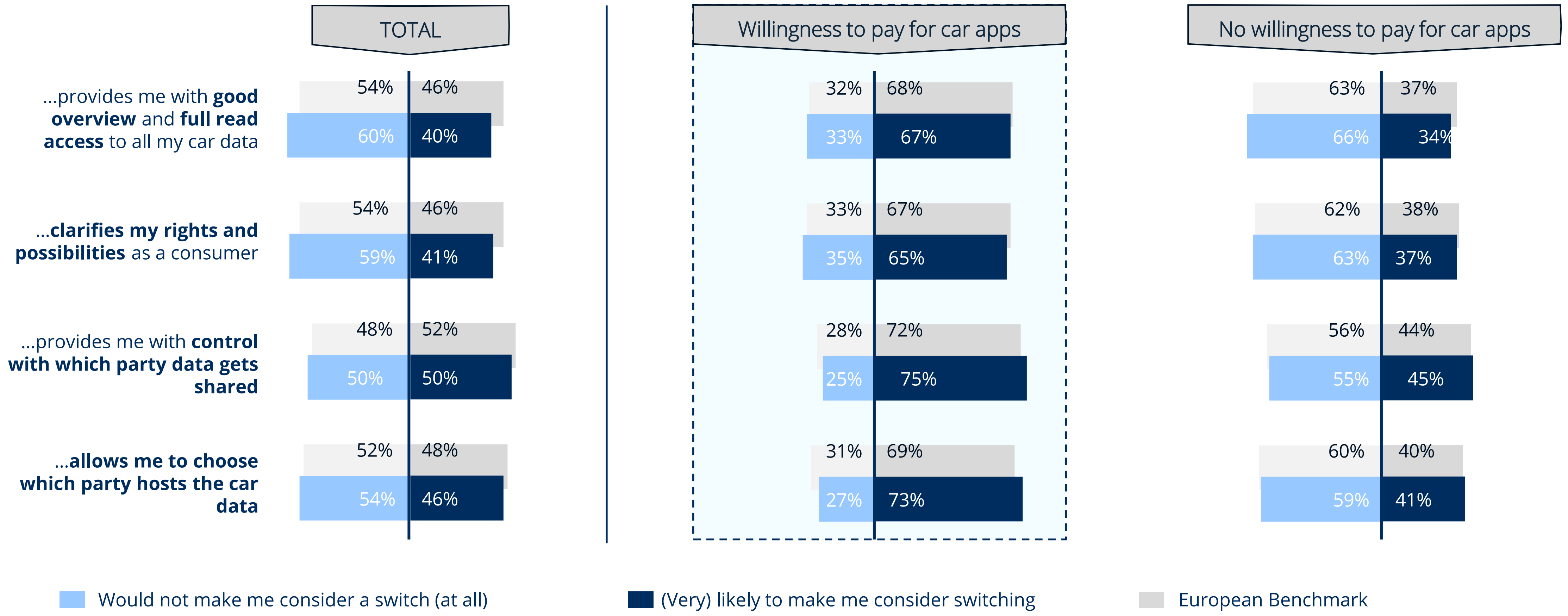


Question Q 34: Is your car "connected" (i.e. uses telematics)?; **Question Q 35:** How far do you agree with the following statements?
Bases: Finland: Total n= 1,000; **Europe:** Total n= 11,011. **Source:** Statista Q 2023.

REGION I

As across all other European countries, drivers willing to pay for apps are more willing to switch brands based on data sharing options

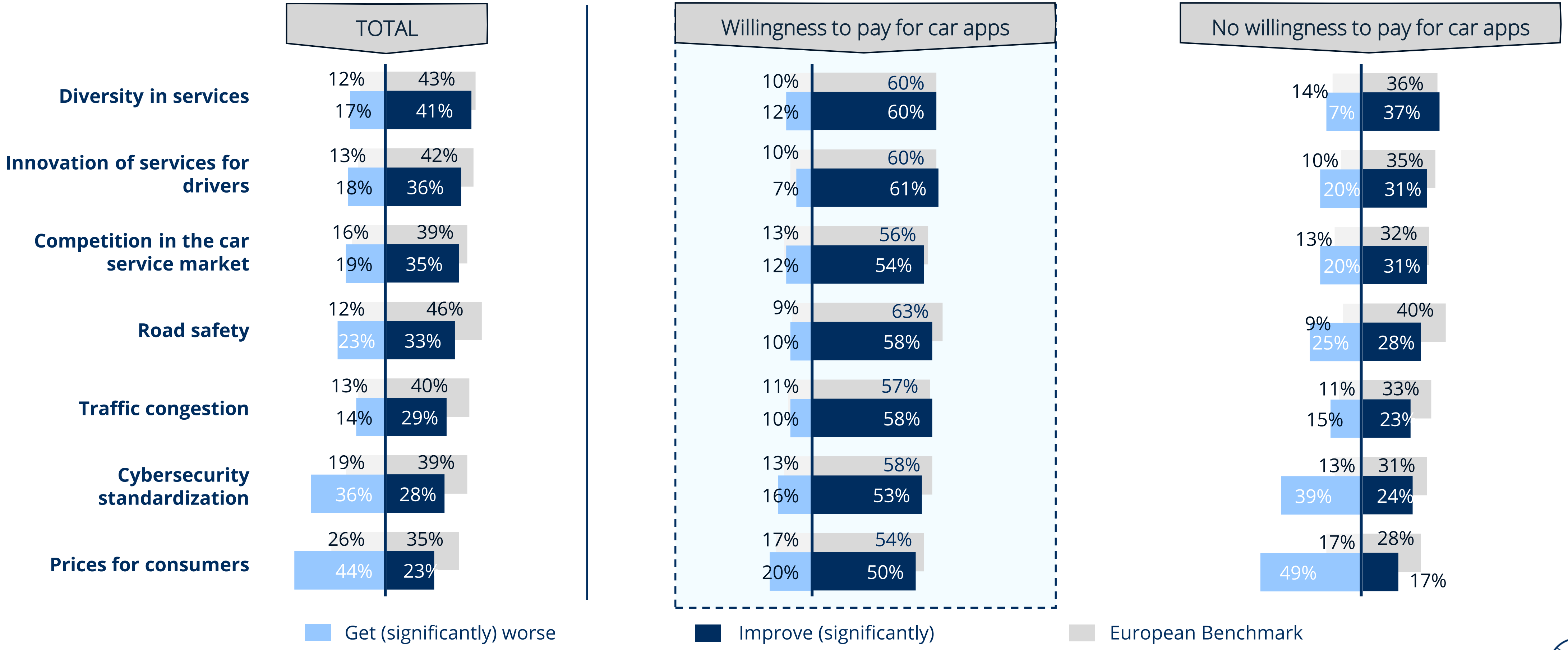
Willingness to switch the brand based on data sharing options – by willingness to pay for car apps
All respondents in %, top 2 and bottom 2 values shown



Question Q 38: To what degree would the following options with regards to usage of the car's data make you consider a switch to another car brand? Another brand that...
Bases: Finland: Total n= 1,000, Willingness to pay for car apps yes / no n= 161 / 839, **Europe:** Total n= 11,011, Willingness to pay for car apps yes / no n= 3,179 / 7,832. **Source:** Statista Q 2023.

Finnish drivers expect diversity in services through legislation – Drivers with willingness to pay for apps are optimistic in general

Expectations about legislative regulation impact – by willingness to pay for car apps
All respondents in %, top 2 and bottom 2 values shown



Question Q 39: There is a debate whether legislation should, as it did in banking, impose car manufacturers to grant qualified third parties automated data access when a car owner authorizes this. What results would you expect from such regulations?
Bases: Finland: Total n= 1,000, Willingness to pay for car apps yes / no n= 161 / 839, **Europe:** Total n= 11,011, Willingness to pay for car apps yes / no n= 3,179 / 7,832. **Source:** Statista Q 2023.

FIA REGION I

Country Deep Dive

Austria

Austria Management Summary

WHEN IT COMES TO **SWITCHING WORKSHOP TYPES, PRICE** PLAYS A CRUCIAL ROLE FOR AUSTRIAN DRIVERS

- Austrian drivers have a roughly **equal preference for manufacturer and independent workshop networks**. Nevertheless, **independent** workshops are generally perceived as **cheaper** but **equally competent as manufacturer** workshops. In comparison, Austrians are **slightly less loyal** to their local workshop than the European average.
- Drivers who prefer manufacturer workshops could be persuaded to **switch to an independent workshop** primarily due to a **lower price**. Other aspects, such as services provided, are less frequently stated as a relevant reason for switching.
- The **price is even more relevant** among Austrians who prefer independent workshops. Three out of four state that a lower price there could convince them to **switch to a manufacturer workshop**.

IN AUSTRIA, FREE APPS IN EXCHANGE FOR DATA ARE PREFERRED – WILLINGNESS TO SWITCH BRANDS IS BELOW AVERAGE

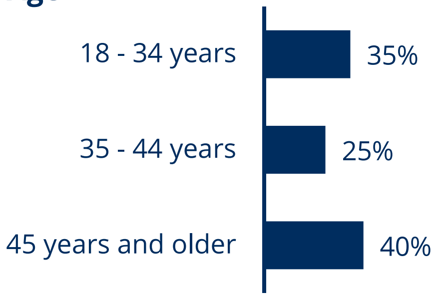
- Similar to the European average, around **one in four drivers from Austria** would generally **consider paying for a car app**. Still, the **preferred** service model is a **free app** that is available in **exchange for driver data**.
- **One-third** of Austrians can imagine **paying for real-time navigation**, making it the most popular connected car service. Currently, about **one in five already drives a connected car**.
- The **willingness to switch** brands in Austria to access internet and app usage or data-sharing options **is slightly below the European average**, and it does not exceed 50% in any scenario.
- Austrians have **positive expectations of various benefits** from potential legislative regulations. In general, drivers with a positive attitude towards the impact of regulations are more open to technological developments **leading to a higher interest in connected services.**

2/3 of Austrians are in motor clubs - The majority drives cars without telematics; No preference between manufacturer and independent WSs

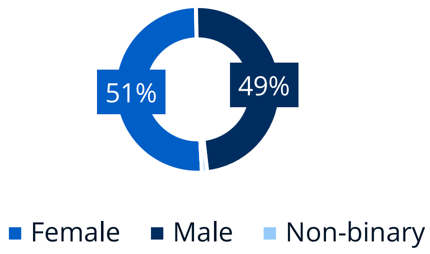
Country Characteristics Austria

SOCIODEMOGRAPHICS & MEMBERSHIP

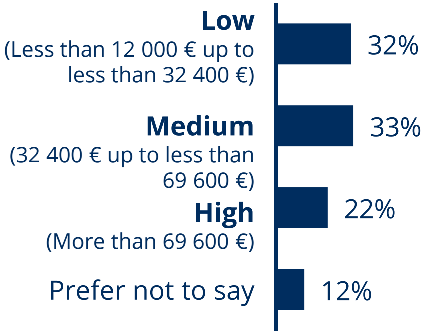
Age



Gender



Income



Motor club Membership

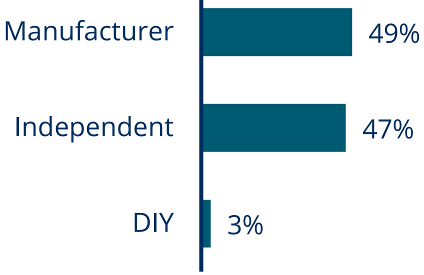
66% Yes

No **34%**

VEHICLE & ATTITUDE

Vehicle Ownership

SMR Preference



Vehicle Age

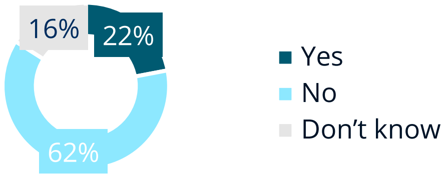
7 years (Median)

Willingness to Pay for Car Apps

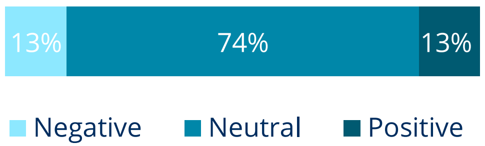
27% Yes

No **73%**

Connected Car



Attitude towards (Legislative) Market Development

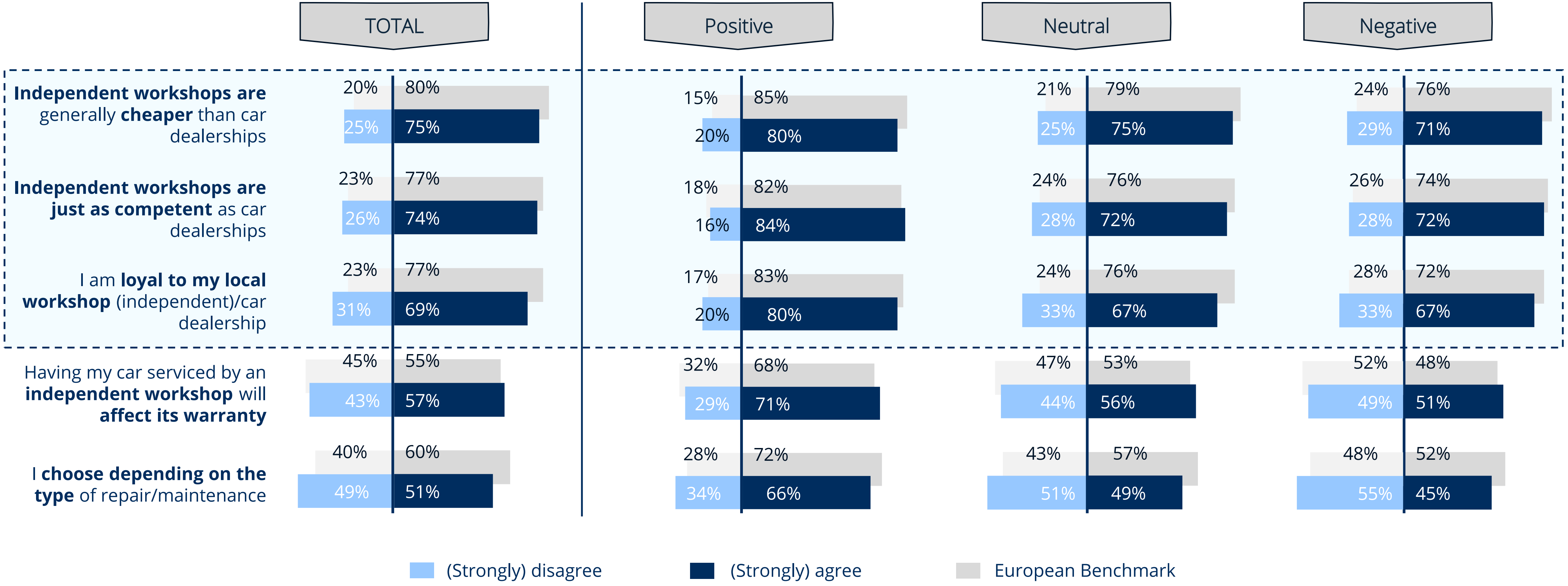


Question Q 1: What is your gender?, **Q 2:** How old are you?, **Q 10:** How old is your car?, **Q 40:** About how high is the annual gross income that your household has at its disposal, before tax and contributions?, **Q 43:** Are you currently member of motorist club?, **Q 11:** How did you acquire your car?, **Q 15:** What is your strategy of selecting a service/workshop for your car when needing regular maintenance?, **Q 28:** Would you consider paying for dedicated apps offered [...]?, **Q 34:** Is your car connected?, **Q 39:** There is a debate whether legislation should, [...]. What results would you expect from such regulations?
Bases: Austria: Total n= 1,002. **Source:** Statista Q 2023.

REGION I

Austrian car drivers perceive independent WSs as cheaper but just as competent as car dealerships – 7 in 10 are loyal to their local workshop

Top 5 statements about car repair/maintenance – by attitude towards (legislative) market developments
All respondents in %, top 2 and bottom 2 values shown

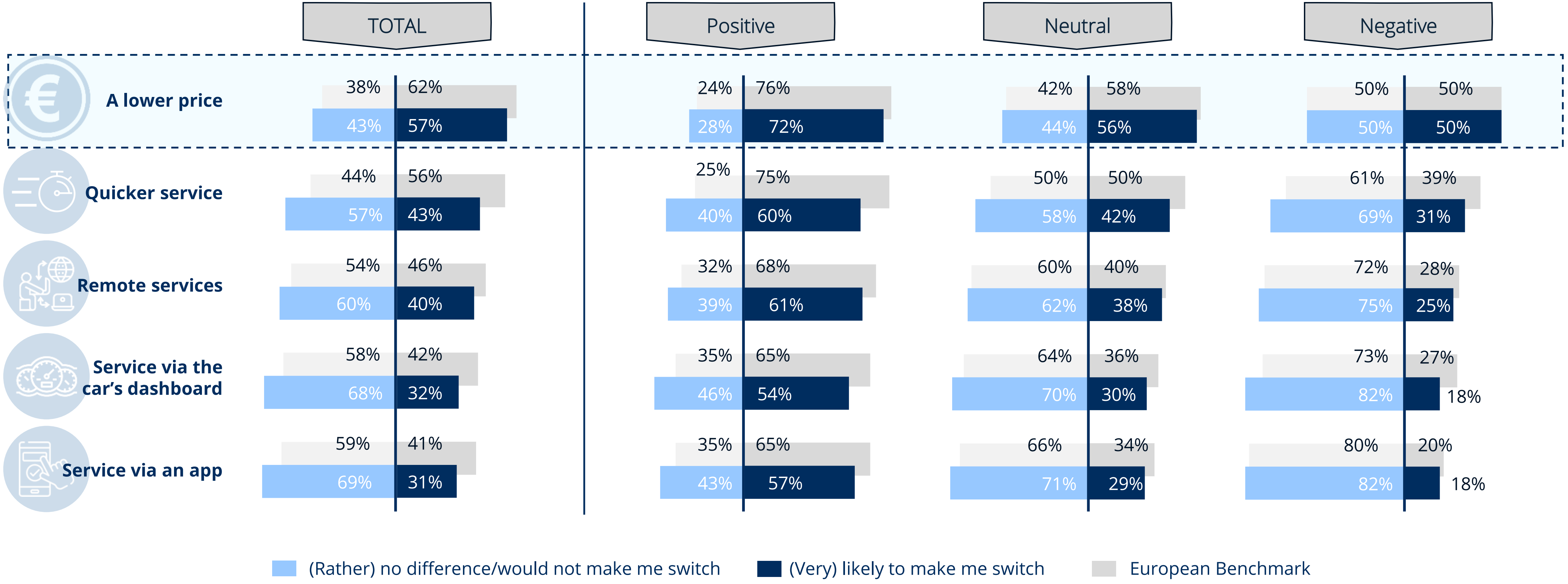


Question Q 19: For car repair/maintenance, to what extent would you agree with each of the following statements?
Subgroups for attitude towards (legislative) market developments are calculated based on the average of Q39 (1, 2=Get (significantly) worse; 3=Remain unchanged; 4,5=Improve (significantly): Positive > 3.9, Neutral = 2.5 to 3.9, Negative < 2.5.
Bases: Austria: Total n= 1,002, Positive n= 129, Neutral n= 744, Negative n= 129; **Europe:** Total n= 11,011, Positive n= 2,344, Neutral n= 7,574, Negative n= 1,093. **Source:** Statista Q 2023.

REGION I

Only lower prices could convince more than 50% to switch to an independent WS – Switching is most likely for those with positive attitude toward legislation

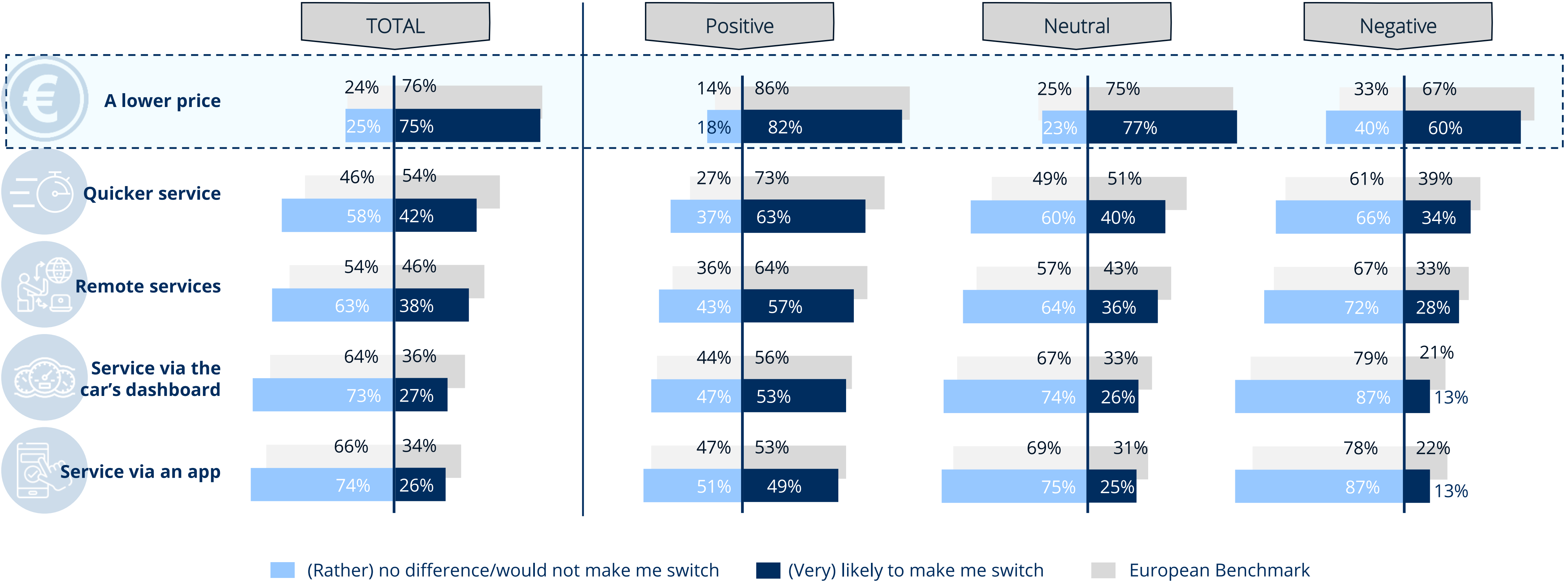
Arguments for switching workshop type: **manufacturer to independent** – by attitude towards (legislative) market developments
Respondents who prefer manufacturer networks/workshops in %, top 2 and bottom 2 values shown



Question Q 20.1: How likely are you to switch to an independent workshop in the following situations? If the independent workshop…
Subgroups for attitude towards (legislative) market developments are calculated based on the average of Q39 (1, 2=Get (significantly) worse; 3=Remain unchanged; 4,5=Improve (significantly): Positive > 3.9, Neutral = 2.5 to 3.9, Negative < 2.5.
Bases: Austria: Total n= 493, Positive n= 72, Neutral n= 353, Negative n= 68; **Europe:** Total n= 4,575, Positive n= 1,167, Neutral n= 3,011, Negative n= 397. **Source:** Statista Q 2023.

A similar picture regarding switching to manufacturer WSs: Price is by far the strongest argument to switch

Arguments for switching workshop type: **independent to manufacturer** – by attitude towards (legislative) market developments
Respondents who prefer independent networks/workshops in %, top 2 and bottom 2 values shown



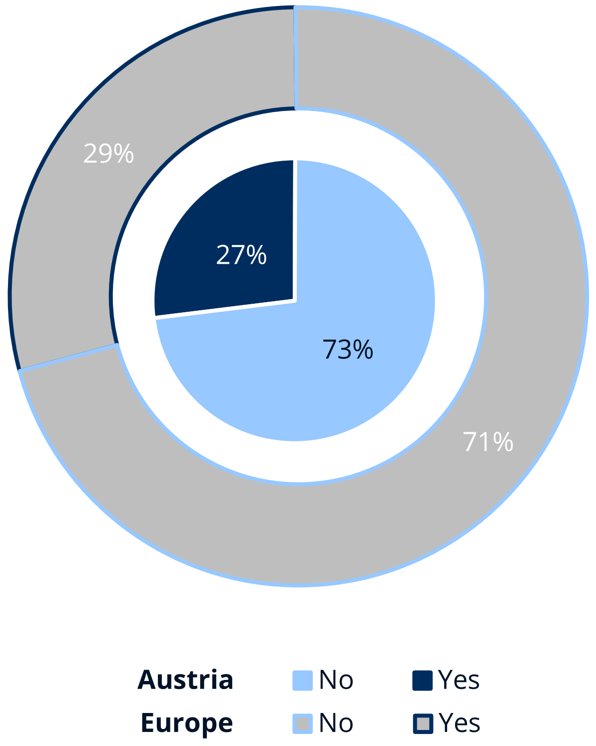
Question Q 20.2: How likely are you to switch to a manufacturer workshop in the following situations? If the manufacturer workshop....
Subgroups for attitude towards (legislative) market developments are calculated based on the average of Q39 (1, 2=Get (significantly) worse; 3=Remain unchanged; 4,5=Improve (significantly): Positive > 3.9, Neutral = 2.5 to 3.9, Negative < 2.5.
Bases: Austria: Total n= 464, Positive n= 51, Neutral n= 360, Negative n= 53; **Europe:** Total n= 5,776, Positive n= 1,098, Neutral n= 4,081, Negative n= 597. **Source:** Statista Q 2023.

REGION I

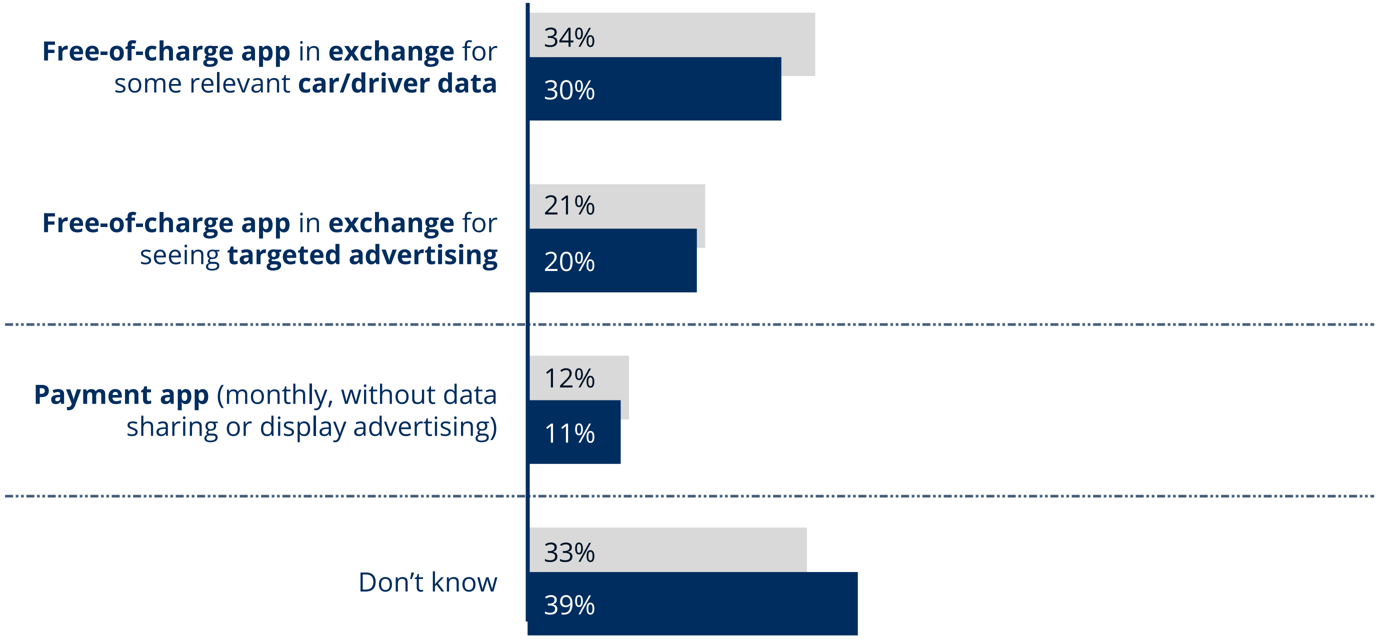
Similar to the European benchmark, just under 30% of drivers consider paying for car apps - No clear preference regarding the app service model

Considering paying for dedicated car apps and preferred service model
All respondents in %

Considering paying for car apps



Preferred car app service model

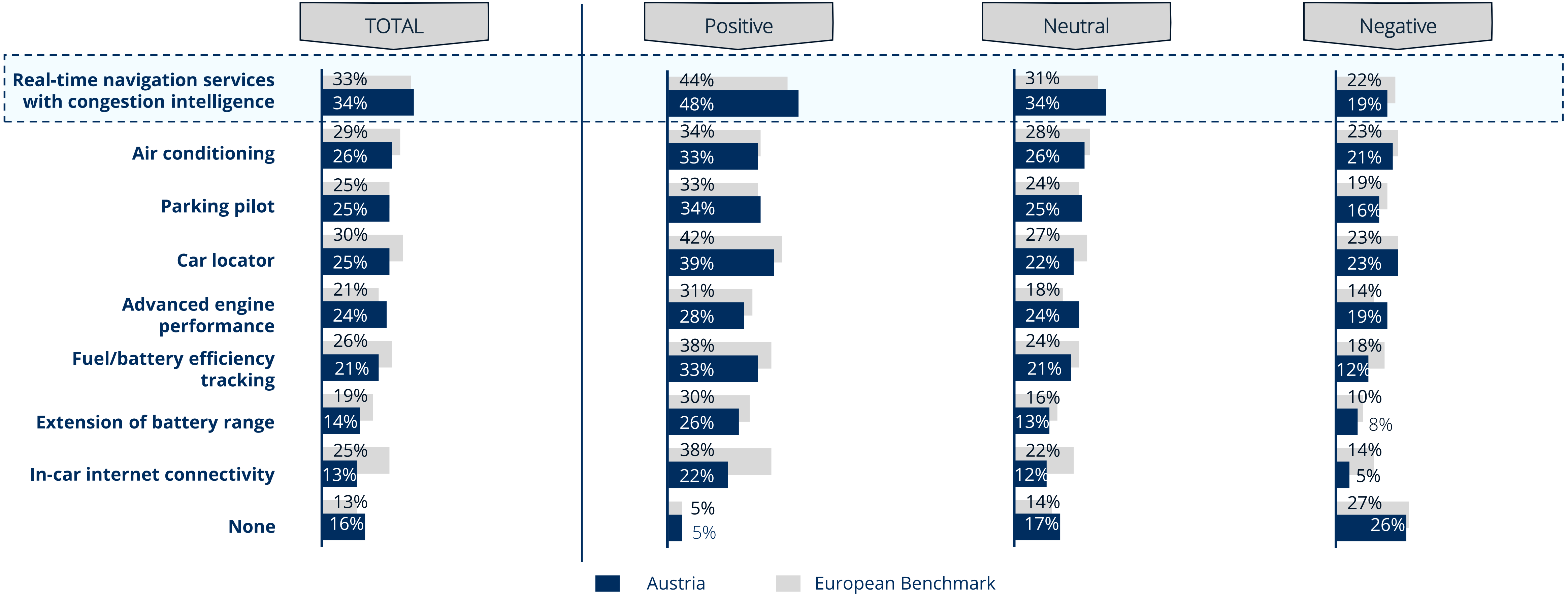


Question Q 28: Would you consider paying for dedicated apps offered exclusively for the cars display/screen?; **Question Q 29:** Dedicated car apps can be offered in various ways: Which of the following service models do you prefer?
Bases: Austria: Total n= 1,002; **Europe:** Total n= 11,011. **Source:** Statista Q 2023.

FIA REGION I

Real-time navigation is No. 1 when it comes to specific connected car services – Overall, there is a rather low willingness to pay for specific services

Services in a 'connected car' respondents are willing to pay for – by attitude towards (legislative) market developments
All respondents in %

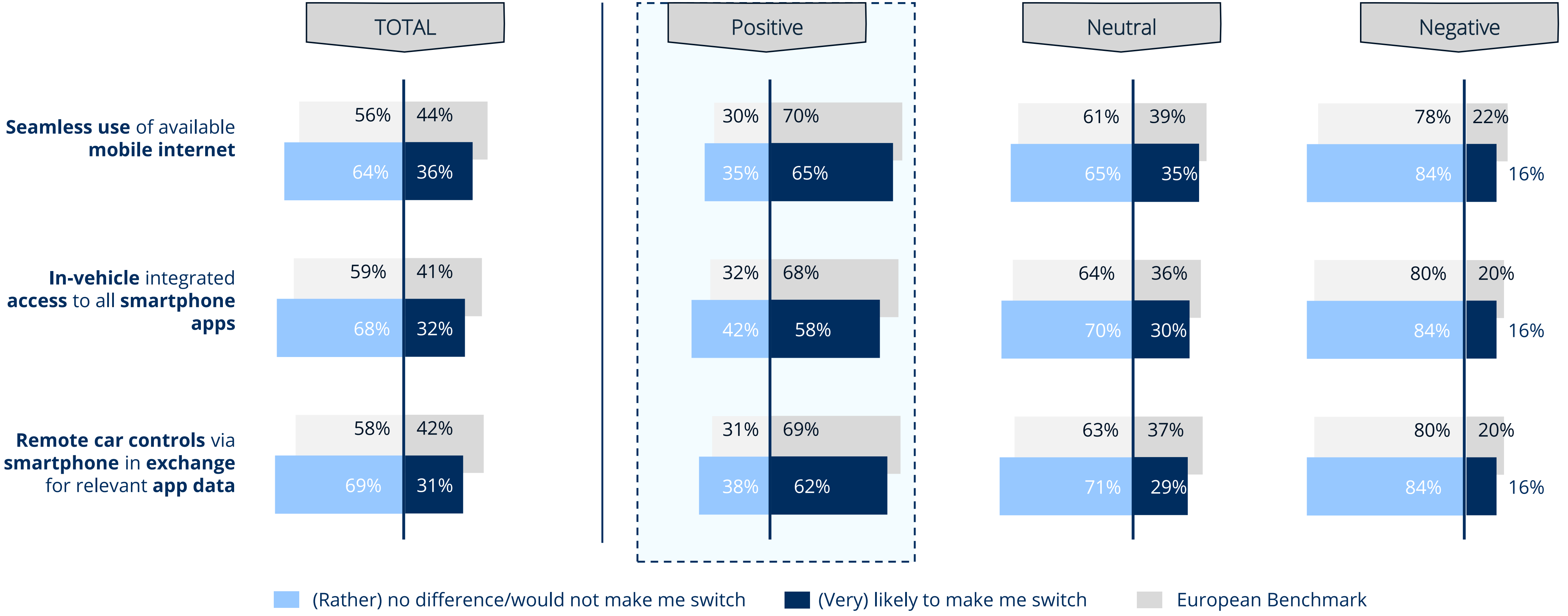


Question Q 32: For which of the following services in a 'connected car', would you generally be willing to pay a monthly amount?
Subgroups for attitude towards (legislative) market developments are calculated based on the average of Q39 (1, 2=Get (significantly) worse; 3=Remain unchanged; 4,5=Improve (significantly): Positive > 3.9, Neutral = 2.5 to 3.9, Negative < 2.5.
Bases: Austria: Total n= 1,002, Positive n= 129, Neutral n= 744, Negative n= 129; **Europe:** Total n= 11,011, Positive n= 2,344, Neutral n= 7,574, Negative n= 1,093. **Source:** Statista Q 2023.

REGION I

Only the more optimistic drivers (positive attitude towards market & legislation) consider switching to another brand because of internet and app advantages

Willingness to switch the brand based on internet and app usage – by attitude towards (legislative) market developments
All respondents in %, top 2 and bottom 2 values shown



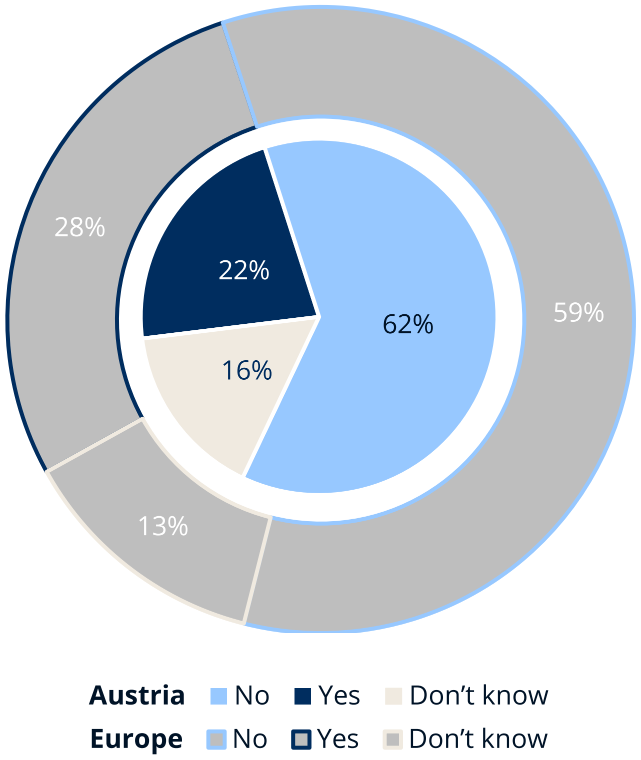
Question Q 31: To what degree would the following options with regards to the use of internet and apps make you consider to switch to another car brand? Another brand that...
Subgroups for attitude towards (legislative) market developments are calculated based on the average of Q39 (1, 2=Get (significantly) worse; 3=Remain unchanged; 4,5=Improve (significantly): Positive > 3.9, Neutral = 2.5 to 3.9, Negative < 2.5.
Bases: Austria: Total n= 1,002, Positive n= 129, Neutral n= 744, Negative n= 129; **Europe:** Total n= 11,011, Positive n= 2,344, Neutral n= 7,574, Negative n= 1,093. **Source:** Statista Q 2023.

REGION I

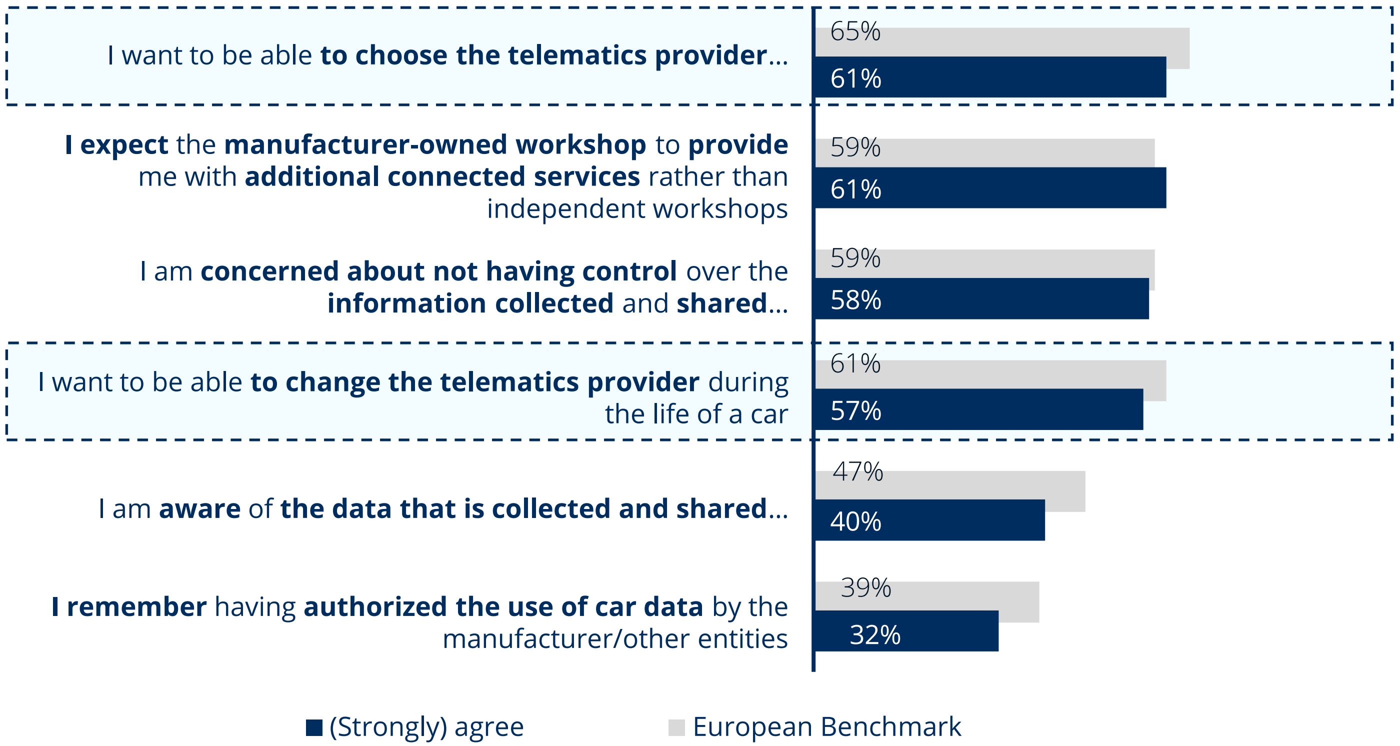
Drivers want to be able to choose & switch telematics providers – With just under one in five connected cars, Austria is below the European benchmark

'Connected car' and telematics
All respondents in % top 2 values for Q35 shown

Is your car „connected"?



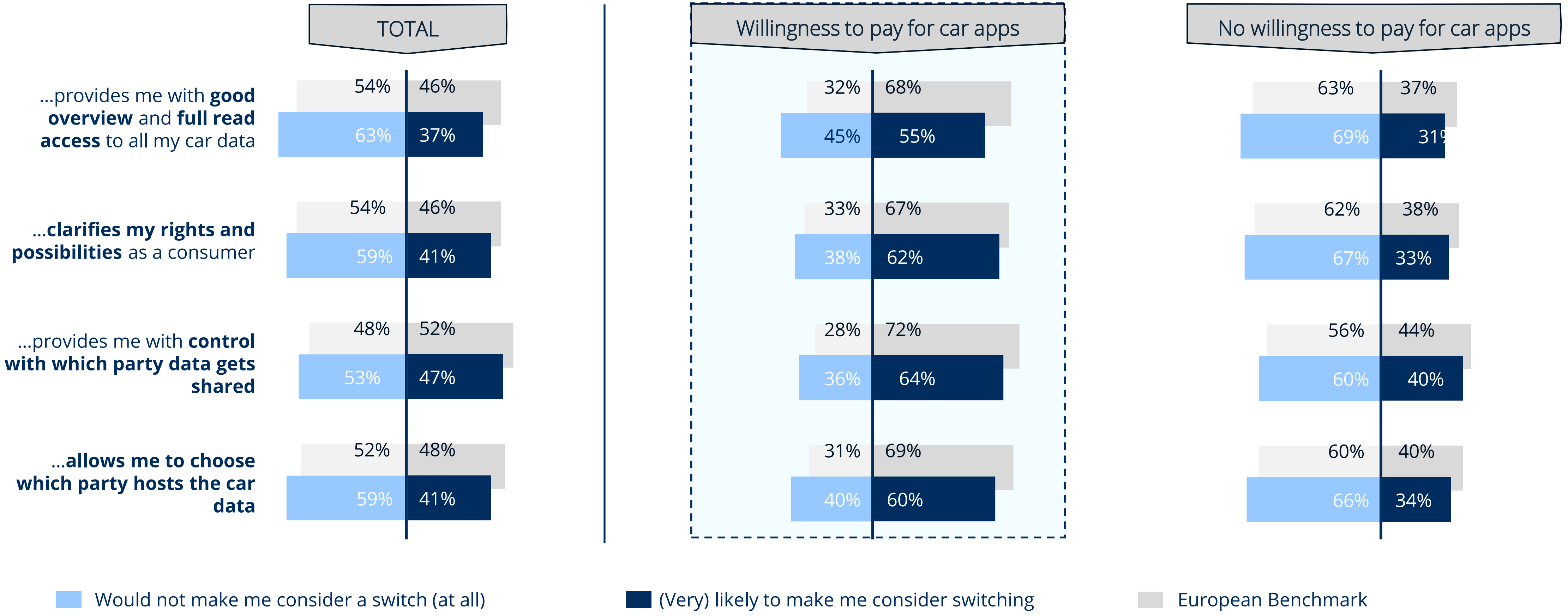
How far do you agree with the following statements?



Question Q 34: Is your car "connected" (i.e. uses telematics)?; **Question Q 35:** How far do you agree with the following statements?
Bases: Austria: Total n= 1,002; **Europe:** Total n= 11,011. **Source:** Statista Q 2023.

Austrians are reserved when it comes to switching brands based on data sharing options – Higher interest among drivers who are willing to pay for apps

Willingness to switch the brand based on data sharing options – by willingness to pay for car apps
All respondents in %, top 2 and bottom 2 values shown



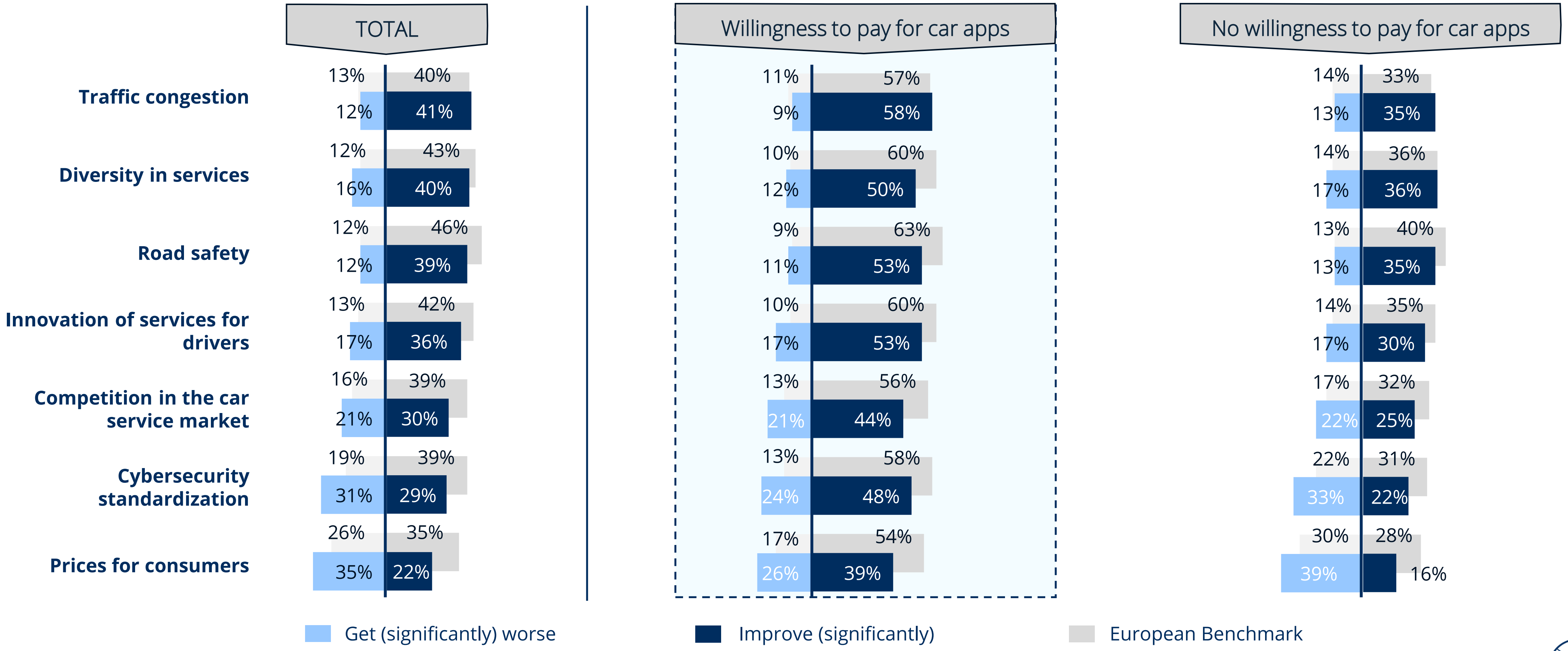
Question Q 38: To what degree would the following options with regards to usage of the car's data make you consider a switch to another car brand? Another brand that...
Bases: Austria: Total n= 1,002, Willingness to pay for car apps yes / no n= 266 / 736; **Europe:** Total n= 11,011, Willingness to pay for car apps yes / no n= 3,179 / 7,832. **Source:** Statista Q 2023.

REGION I

In general, Austrians expect improvement in the wake of new regulations rather than deterioration – Those willing to pay for apps are particularly optimistic

Expectations about legislative regulation impact – by willingness to pay for car apps

All respondents in %, top 2 and bottom 2 values shown



Question Q 39: There is a debate whether legislation should, as it did in banking, impose car manufacturers to grant qualified third parties automated data access when a car owner authorizes this. What results would you expect from such regulations?
Bases: Austria: Total n= 1,002, Willingness to pay for car apps yes / no n= 266 / 736; **Europe:** Total n= 11,011, Willingness to pay for car apps yes / no n= 3,179 / 7,832. **Source:** Statista Q 2023

REGION I

Country Deep Dive
Czech Republic

Czech Republic Management Summary

CZECHS ARE LOYAL TO THEIR INDEPENDENT WORKSHOP – BASED ON LOWER PRICES, NOT NECESSARILY COMPETENCE

- For SMR, **Czechs predominantly visit independent networks** due to their **lower prices**. Though less than in other European countries, most drivers are generally convinced by their equal competence.
- The **loyalty of drivers preferring manufacturers** for their SMR **is more pronounced** than those visiting independent networks. Nevertheless, when it comes to pricing, the **switching tendency increases with lower or medium income**. Remote and digital services are predominantly not convincing.
- Similar to other European countries, **Czech drivers visiting independent networks** are **more price sensitive** and likelier to switch.
- However, looking at the switching tendency of manufacturers and independent workshop preferers overall, Czech drivers are **more loyal to their workshops** than other Europeans.

HIGHER INTEREST IN CAR PAID APPS – DATA OPTIONS AND CONTROL IS NOT AN ARGUMENT FOR SWITCHING

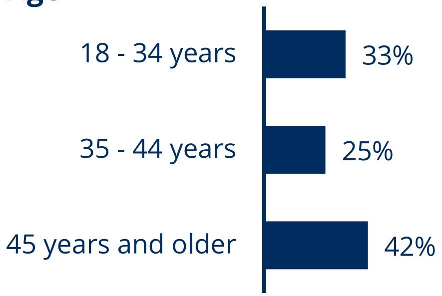
- The Czech Republic goes in line with other European countries regarding dedicated car apps: **nearly one in three would consider paying for car apps**, and the majority **favors free-of-charge apps**. Still, there is a **higher interest in specific connected services**, such as a car locator and real-time navigation.
- Nevertheless, based on internet and app usage options, most Czechs would **not consider switching car brands**. The generally **less price-sensitive manufacturer preferers (for SMR) show slightly more interest**, although still below the European benchmark.
- With an average car age of 9 years, **Czechs tend to drive older cars**. This goes in line with the **below benchmark proportion of connected car drivers**. Still, telematics provider selection and flexibility are key – although Czechs are unlikely to switch brands for this.

The vast majority of Czechs drive cars without telematics systems, and nearly 2/3 prefer independent WSs – Motor club membership is not widespread

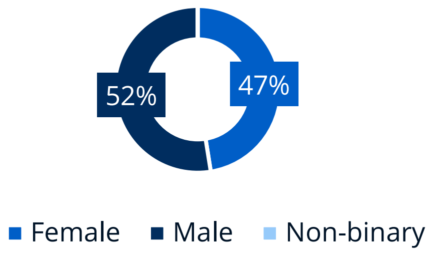
Country Characteristics Czech Republic

SOCIODEMOGRAPHICS & MEMBERSHIP

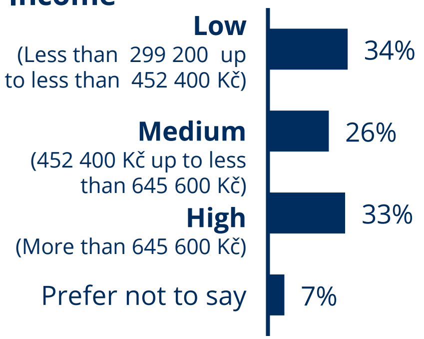
Age



Gender



Income



Motor club Membership

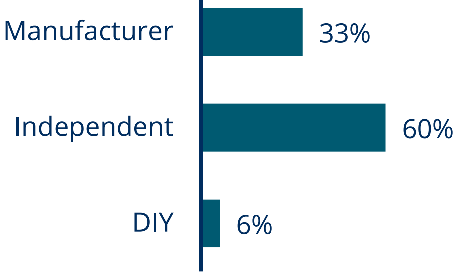
7% Yes

No **93%**

VEHICLE & ATTITUDE

Vehicle Ownership

SMR Preference



Vehicle Age

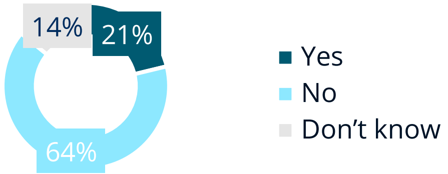
9 years (Median)

Willingness to Pay for Car Apps

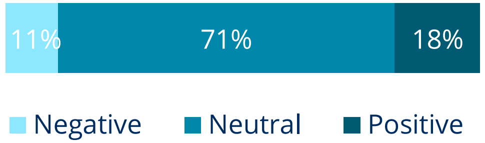
31% Yes

No **69%**

Connected Car



Attitude towards (Legislative) Market Development

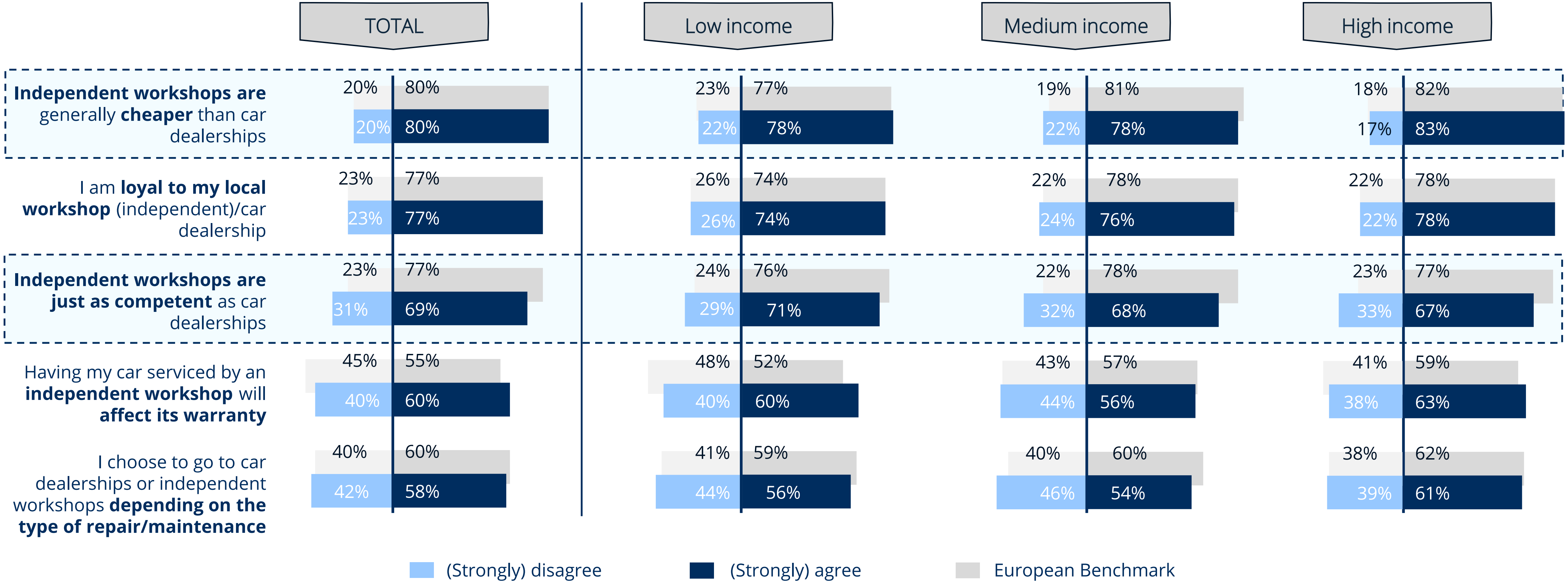


Question Q 1: What is your gender?, **Q 2:** How old are you?, **Q 10:** How old is your car?, **Q 40:** About how high is the annual gross income that your household has at its disposal, before tax and contributions?, **Q 43:** Are you currently member of motorist club?, **Q 11:** How did you acquire your car?, **Q 15:** What is your strategy of selecting a service/workshop for your car when needing regular maintenance?, **Q 28:** Would you consider paying for dedicated apps offered […]?, **Q 34:** Is your car connected?, **Q 39:** There is a debate whether legislation should, […]. What results would you expect from such regulations?
Bases: Czech Republic: Total n= 1,005. **Source:** Statista Q 2023.

REGION I

Independent WS are preferred for their cost-efficiency – less for their competence when compared to the European benchmark

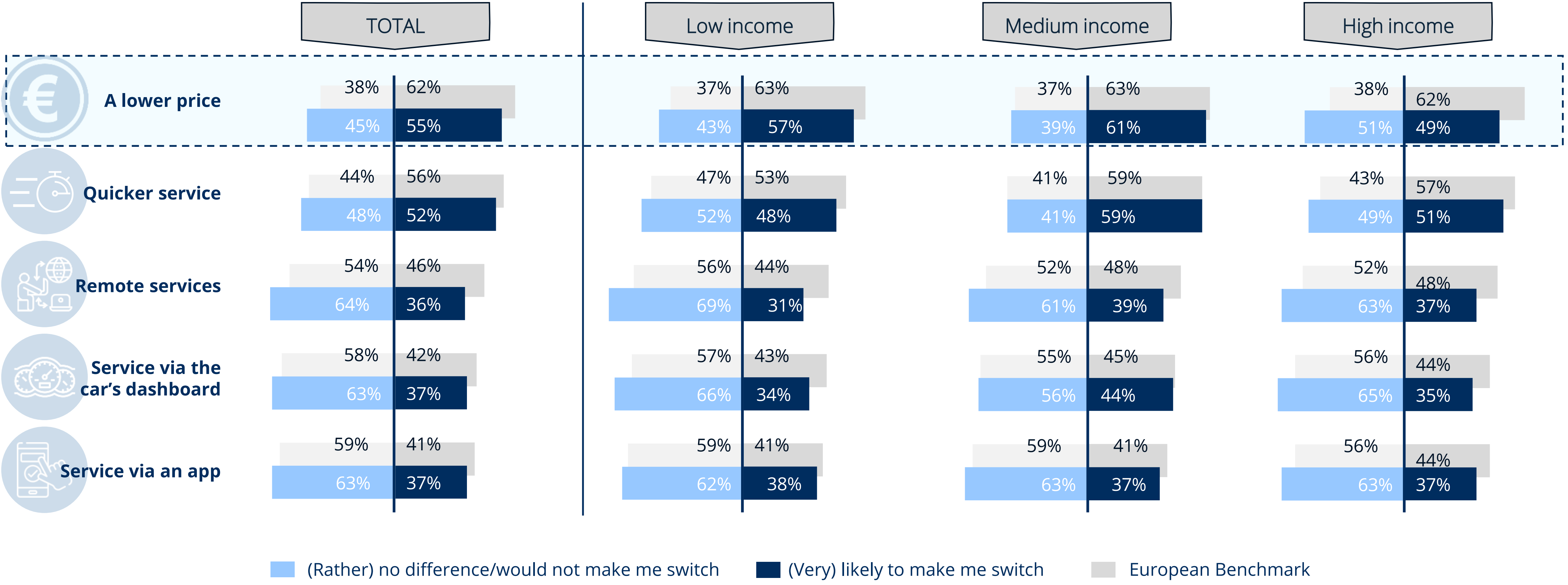
Top 5 statements about car repair/maintenance – by income
All respondents in %, top 2 and bottom 2 values shown



Question Q19: For car repair/maintenance, to what extent would you agree with each of the following statements?
Bases: Czech Republic: Total n= 1,005, Low n= 341, Medium n= 254, High n= 336; **Europe:** Total n= 11,011, Low n= 2,952, Neutral n= 3,618, High n= 3,522. **Source:** Statista Q 2023.

Manufacturer preferers are less likely to switch to independent WS than the Europ. benchmark – drivers with low/medium income are more price sensitive

Arguments for switching workshop type: **manufacturer to independent** – by income
Respondents who prefer manufacturer networks/workshops in %, top 2 and bottom 2 values shown



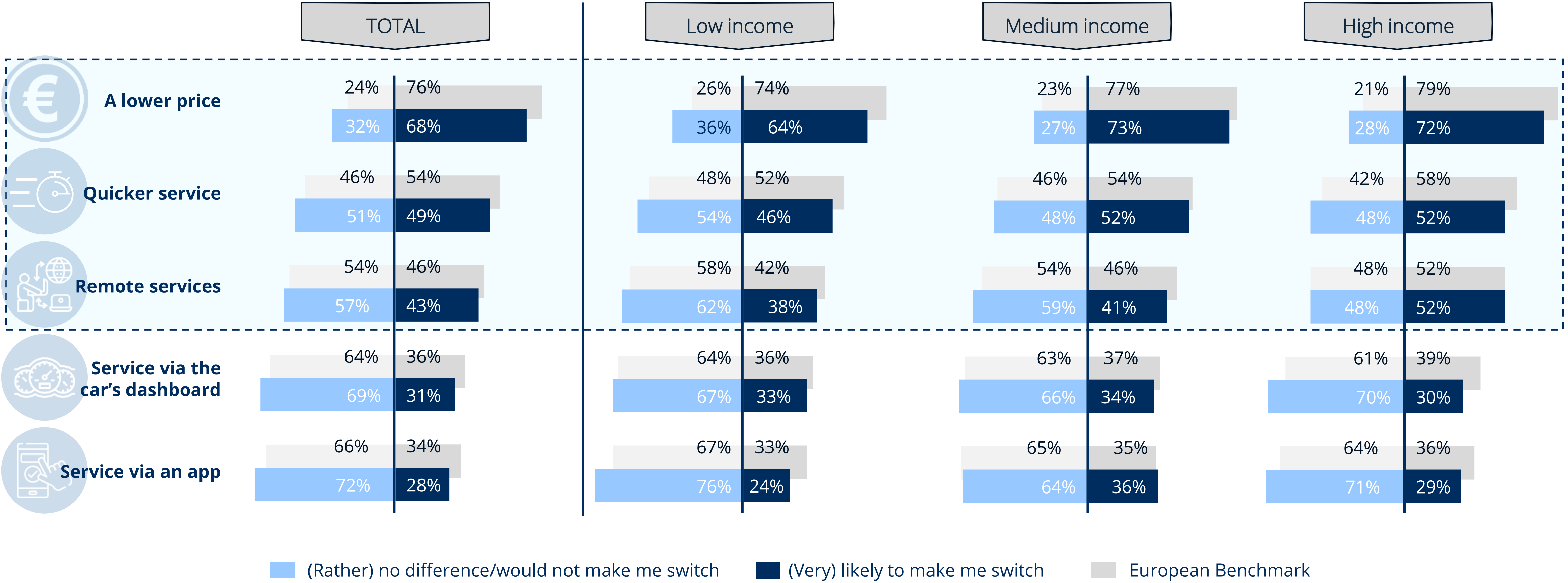
Question Q 20.1: How likely are you to switch to an independent workshop in the following situations? If the independent workshop...
Bases: Czech Republic: Total n= 328, Low n= 94, Medium n= 79, High n= 134; **Europe:** Total n= 4,575, Low n= 1,007, Medium n= 1,455, High n= 1,767. **Source:** Statista Q 2023.

FIA REGION I

A lower price convinces Czechs to switch to a manufacturer WSs – Quicker and remote services especially interesting for drivers with a higher income

Arguments for switching workshop type: **independent to manufacturer** – by income

Respondents who prefer independent networks/workshops in %, top 2 and bottom 2 values shown



Question Q 20.2: How likely are you to switch to a manufacturer workshop in the following situations? If the manufacturer workshop….
Bases: Czech Republic: Total n= 606, Low income n= 220, Medium income n= 157, High income n= 182; **Europe:** Total n= 5,776, Low income n= 1,708, Medium income n= 1,973, High income n= 1,614. **Source:** Statista Q 2023

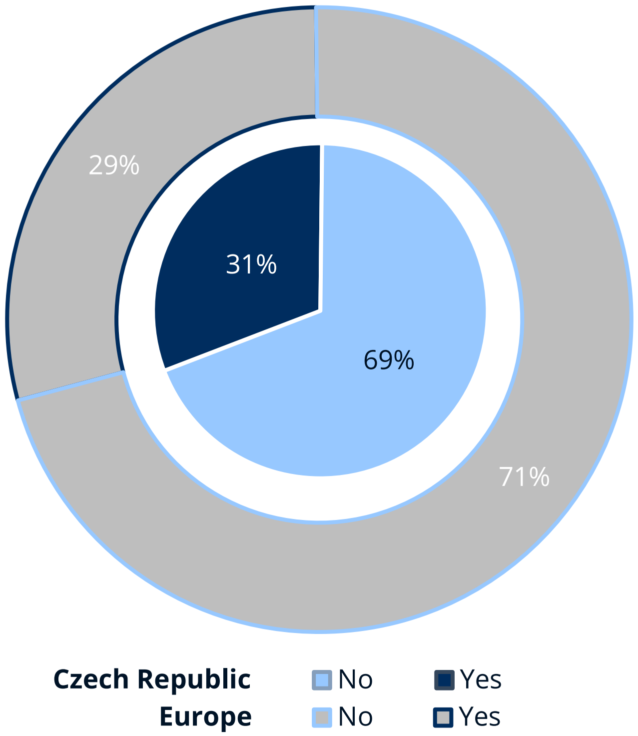
FIA REGION I

SMR Network

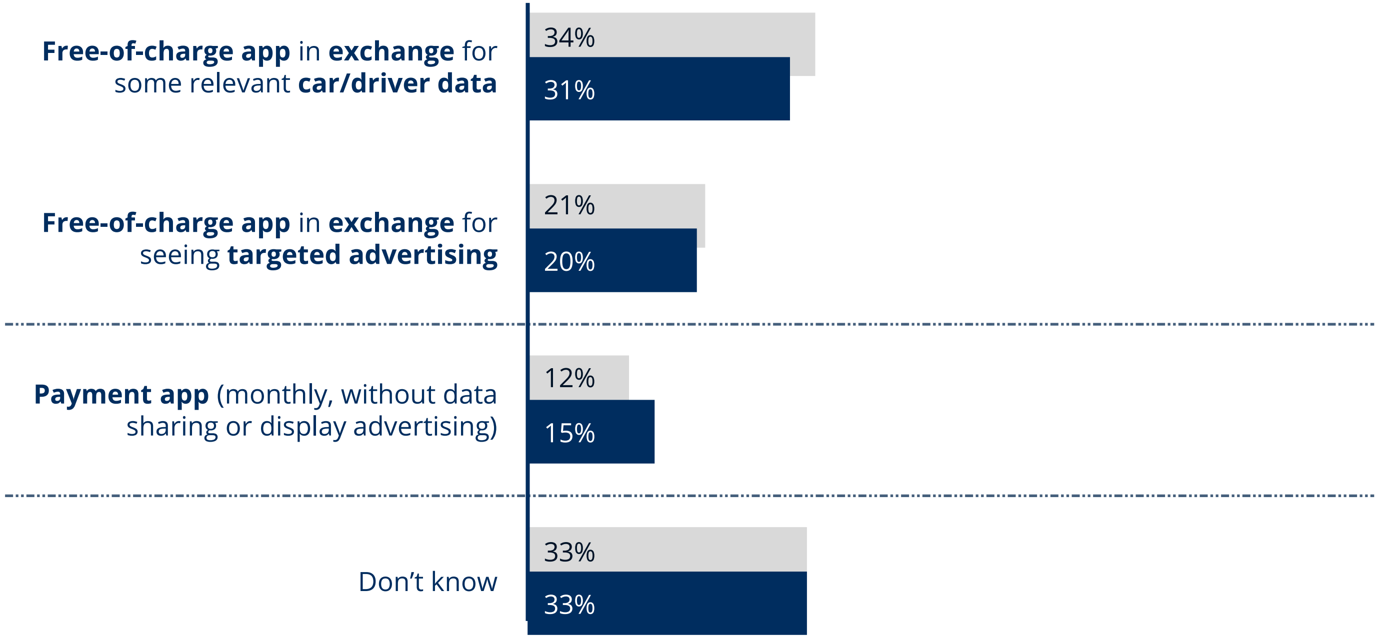
Similar to other European countries, 2/3 of Czechs would not be willing to pay for in-vehicle apps and prefer free-of-charge apps in exchange for car data

Considering paying for dedicated car apps and preferred service model
All respondents in %

Considering paying for car apps



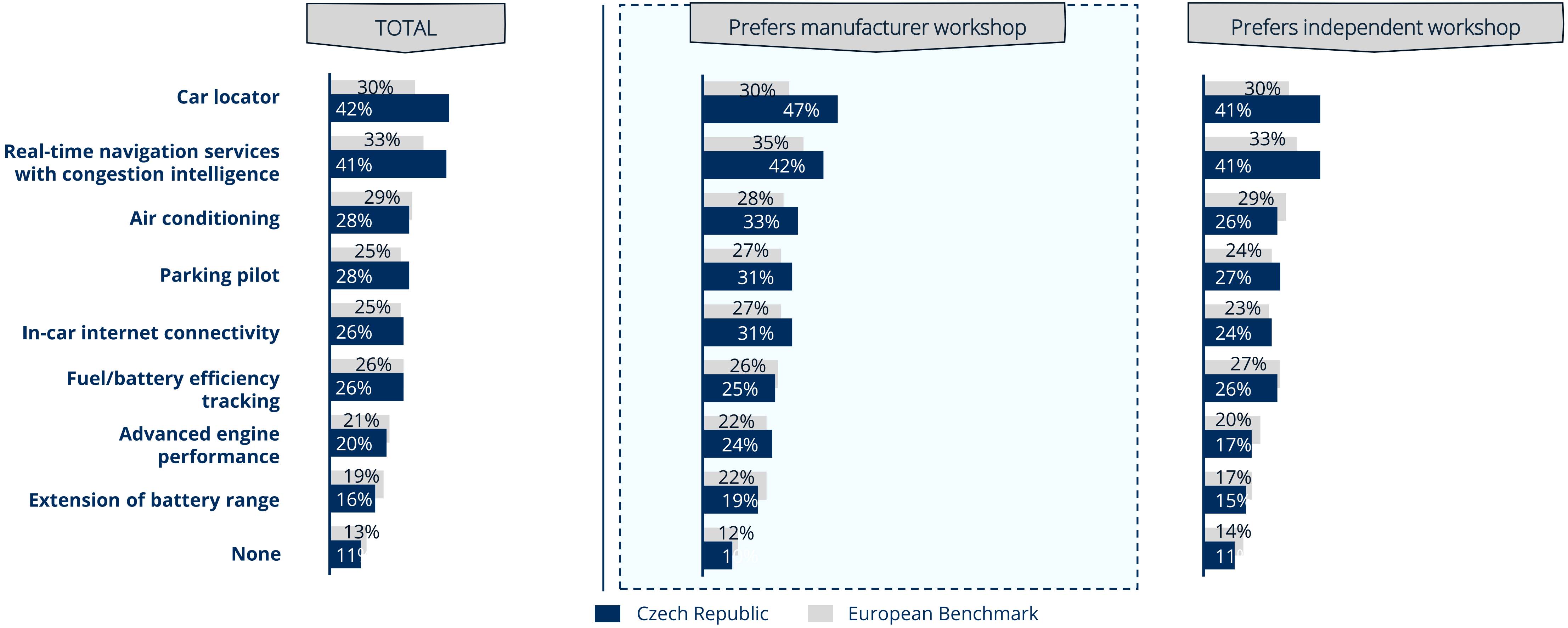
Preferred car app service model



Question Q 28: Would you consider paying for dedicated apps offered exclusively for the cars display/screen?; **Question Q 29:** Dedicated car apps can be offered in various ways: Which of the following service models do you prefer?
Bases: Czech Republic: Total n= 1,005; **Europe:** Total n= 11,011. **Source:** Statista Q 2023.

Above average: 2 of 5 Czech would be willing to pay for a car locator and navigation services – manufacturer preferers show slightly more interest

Services in a ‘connected car’ respondents are willing to pay for – by SMR workshop preference (DIY not displayed)
All respondents in %

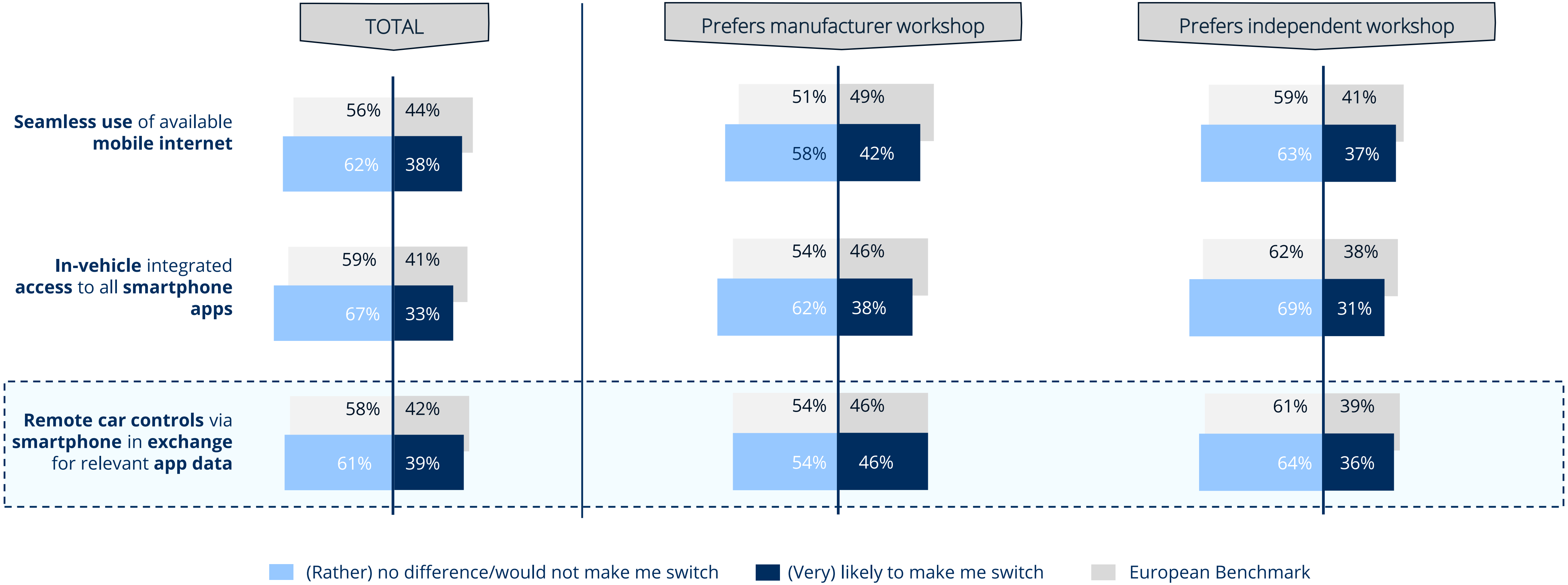


Question Q 32: For which of the following services in a ‘connected car’, would you generally be willing to pay a monthly amount?
Bases: Czech Republic: Total n= 1,005, Prefers manufacturer workshops n= 328, Prefers independent workshop n= 606; **Europe:** Total n= 11,011, Prefers manufacturer workshops n= 4,575, Prefers independent workshop n= 5,776. **Source:** Statista Q 2023.

REGION I

Internet and app usage do not convince Czechs to switch to another brand – manufacturer customers show more interest, esp. in remote car control

Willingness to switch the brand based on internet and app usage – by SMR workshop preference (DIY not displayed)
All respondents in %, top 2 and bottom 2 values shown



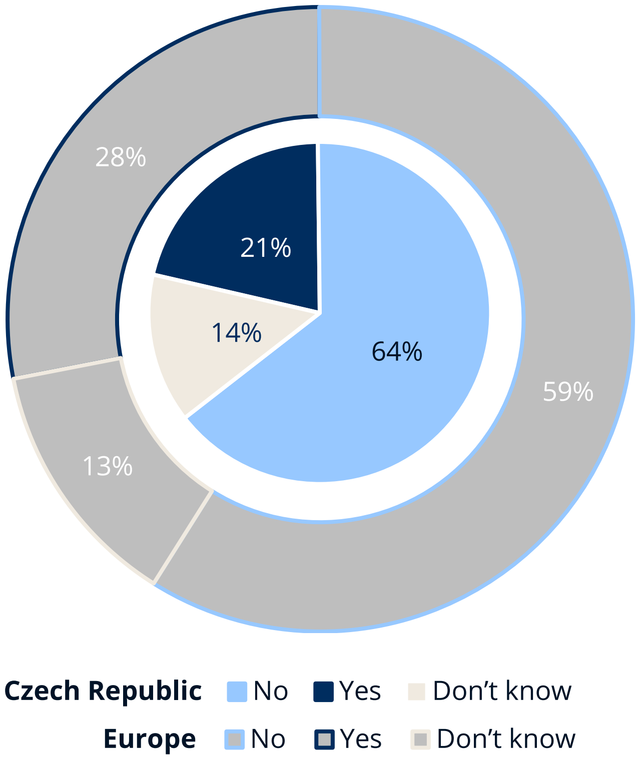
Question Q 31: To what degree would the following options with regards to the use of internet and apps make you consider to switch to another car brand? Another brand that…
Bases: Czech Republic: Total n= 1,005, Prefers manufacturer workshops n= 328, Prefers independent workshop n= 606; **Europe:** Total n= 11,011, Prefers manufacturer workshops n= 4,575, Prefers independent workshop n= 5,776. **Source:** Statista Q 2023.

REGION I

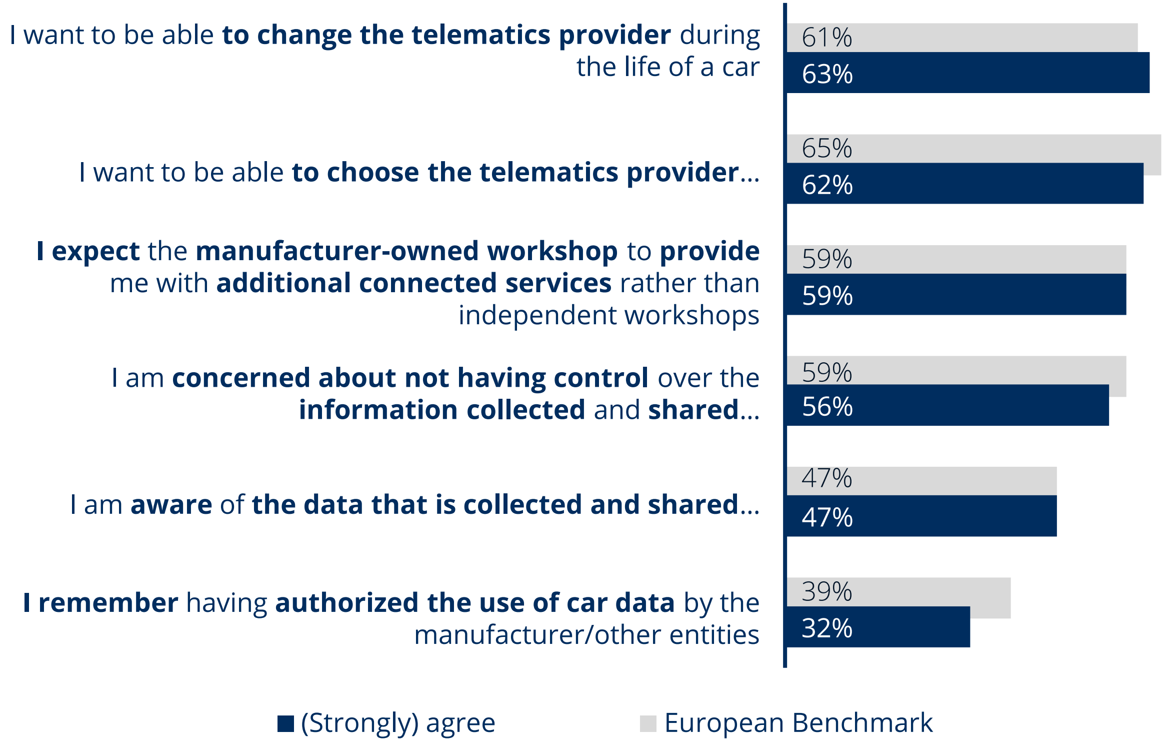
Telematics systems are less prevalent – For connected cars, Czechs perceive the provider choice and flexibility as relevant

'Connected car' and telematics
All respondents in % top 2 values for Q35 shown

Is your car „connected"?



How far do you agree with the following statements?

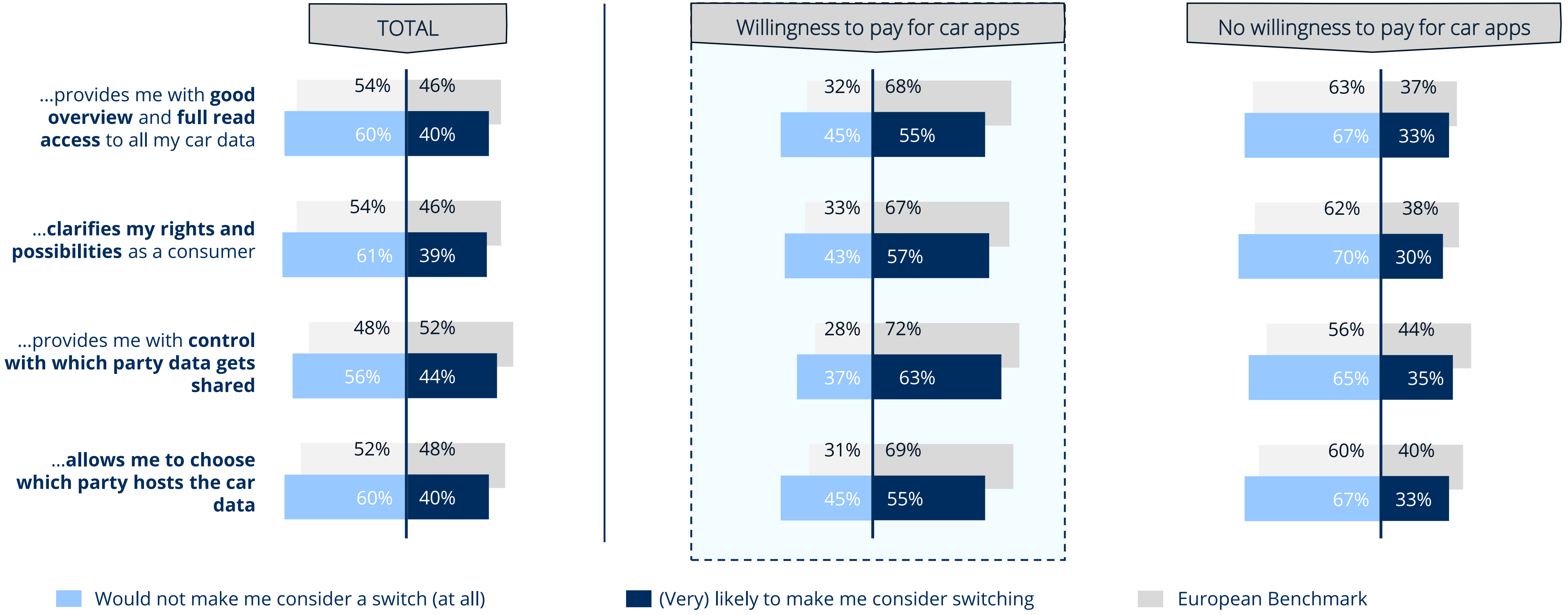


Question Q 34: Is your car "connected" (i.e. uses telematics)?; **Question Q 35:** How far do you agree with the following statements?
Bases: Czech Republic: Total n= 1,005; **Europe:** Total n= 11,011. **Source:** Statista Q 2023.

REGION I

Czechs are less interested in a brand that gives them data control – Even drivers w/ the willingness to pay for apps are less interested than in other countries

Willingness to switch the brand based on data sharing options – by willingness to pay for car apps
All respondents in %, top 2 and bottom 2 values shown

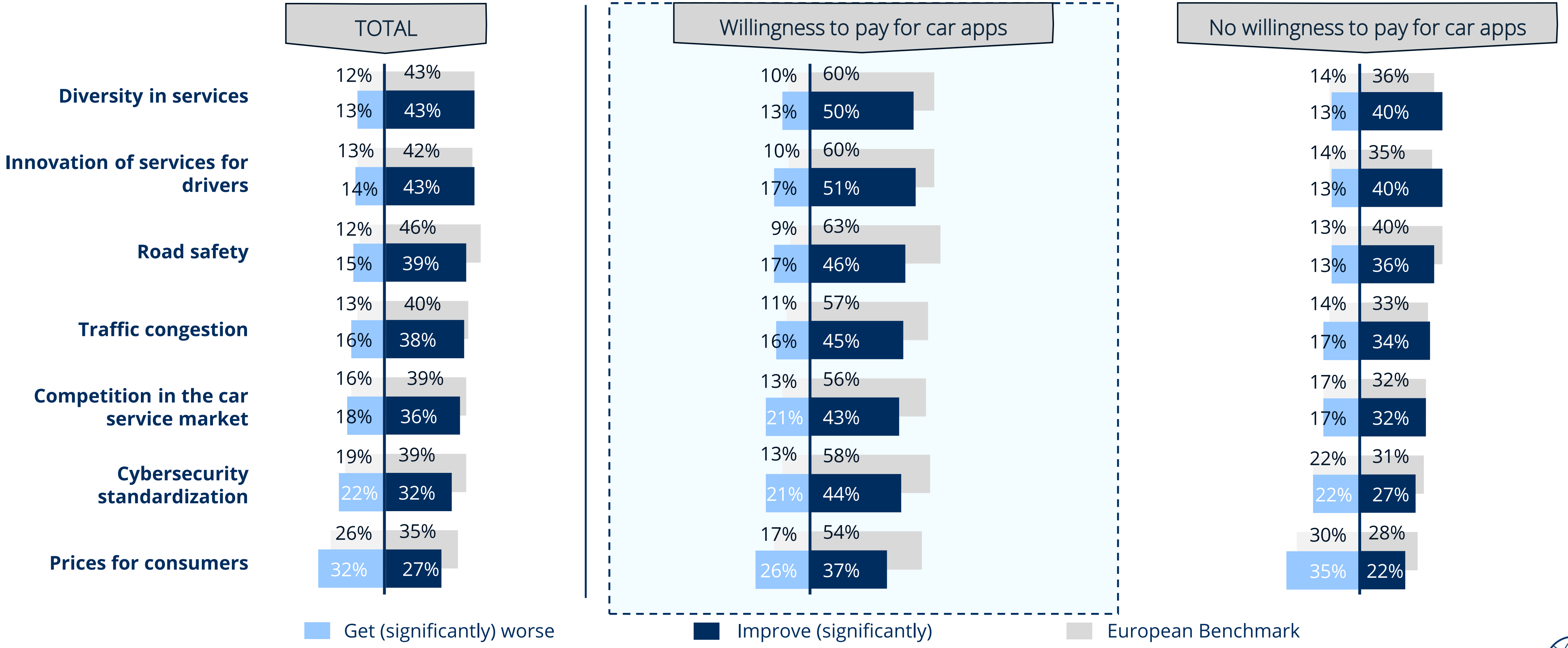


Question Q 38: To what degree would the following options with regards to usage of the car's data make you consider a switch to another car brand? Another brand that...
Bases: Czech Republic: Total n= 1,005, Willingness to pay for car apps: yes / no n= 315 / 690; **Europe:** Total n= 11,011, Willingness to pay for car apps yes / no n= 3,179 / 7,832. **Source:** Statista Q 2023.

REGION I

Generally, Czechs believe less in price and cybersecurity improvements – Drivers willing to pay for apps are more optimistic; however, still below benchmark

Expectations about legislative regulation impact – by willingness to pay for car apps
All respondents in %, top 2 and bottom 2 values shown



Question Q 39: There is a debate whether legislation should, as it did in banking, impose car manufacturers to grant qualified third parties automated data access when a car owner authorizes this. What results would you expect from such regulations?
Bases: Czech Republic: Total n= 1,005, Willingness to pay for car apps yes / no n= 315 / 690; **Europe:** Total n= 11,011, Willingness to pay for car apps yes / no n= 3,179 / 7,832. **Source:** Statista Q 2023

FIA REGION I

Country Deep Dive

Germany

Germany Management Summary

INDEPENDENT NETWORKS STRUGGLE TO CONVINCE PREFERERS OF MANUFACTURERS TO SWITCH

- In general, **manufacturer and independent workshop networks** are **equally preferred** in Germany. However, **independent workshops** are perceived to **be cheaper** while being **equally competent.**
- German drivers **tend to be loyal**, especially those who service their car at a **manufacturer** workshop. A **lower price and a quicker service** are the most relevant **reasons to switch** to an independent workshop.
- On the other hand, **Germans preferring independent workshops** are **less loyal** – 8 out of 10 would switch to a manufacturer workshop if they offer a lower price. **Willingness to switch** is generally **highest for younger** car drivers.

GERMANS WANT TO BE SELF-DETERMINED IN TERMS OF DATA CONTROL AND CHOICE OF TELEMATICS PROVIDER

- Nearly 1 out of 3 German drivers would consider paying for car apps. However, the **free-of-charge app** is the **most popular** service model. More than **one in three remains undecided**.
- Overall, **German drivers are reluctant** to **pay** for **connected services**. The most favorable services people would pay for are **real-time navigation, air conditioning, and a parking pilot** – in accordance with the European average.
- Germans want to be autonomous and **able to choose and change telematics providers** as well as be in **control of their data.**
- **Traffic congestion** is expected to decrease as a result of legislative regulation – **motor club members** especially **have a positive attitude** on legislative regulation in general.

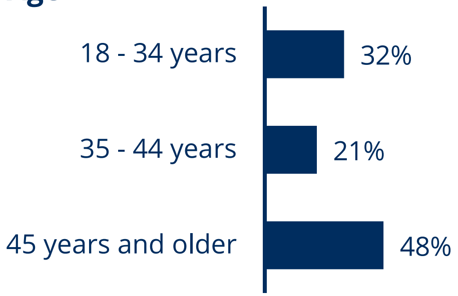
REGION I

1 in 4 already owns a connected car – Preference for manufacturer and independent WSs is equally distributed

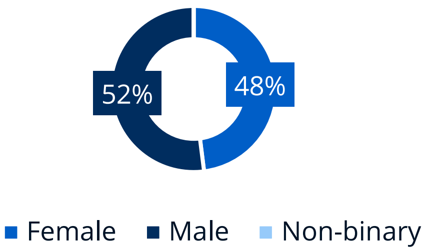
Country Characteristics Germany

SOCIODEMOGRAPHICS & MEMBERSHIP

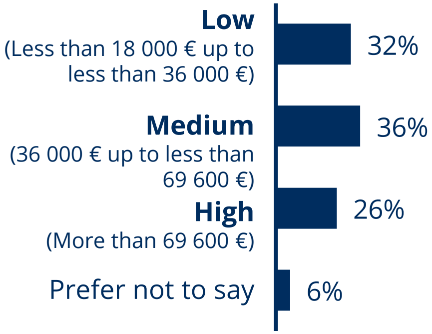
Age



Gender



Income



Motor club Membership

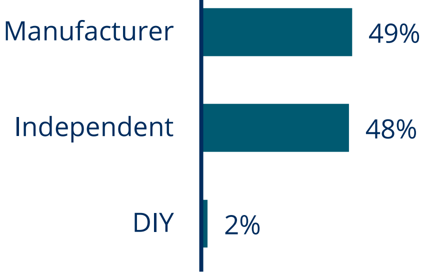
54% Yes

No **46%**

VEHICLE & ATTITUDE

Vehicle Ownership

SMR Preference



Vehicle Age

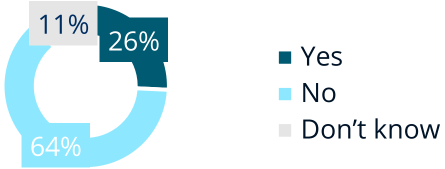
5 years (Median)

Willingness to Pay for Car Apps

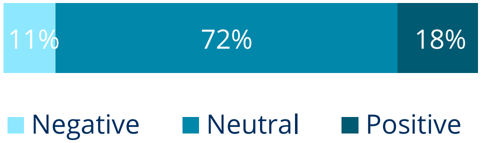
30% Yes

No **70%**

Connected Car



Attitude towards (Legislative) Market Development

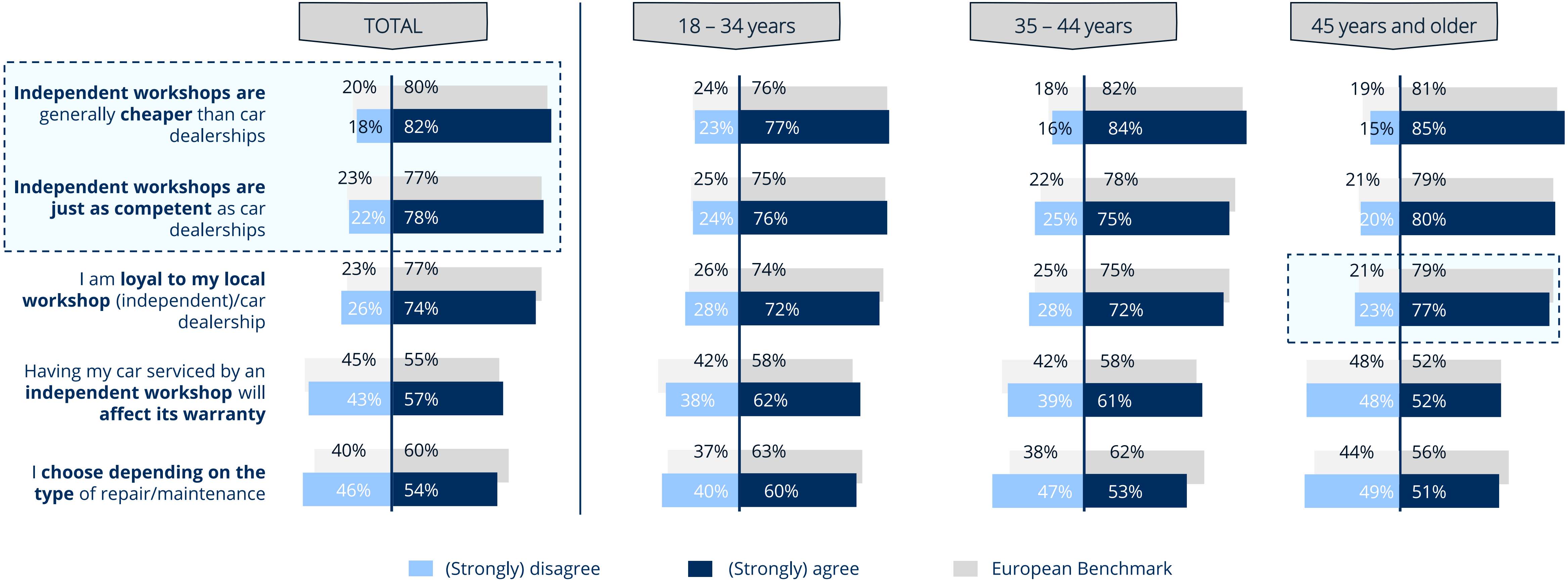


Question Q 1: What is your gender?, **Q 2:** How old are you?, **Q 10:** How old is your car?, **Q 40:** About how high is the annual gross income that your household has at its disposal, before tax and contributions?, **Q 43:** Are you currently member of motorist club?, **Q 11:** How did you acquire your car?, **Q 15:** What is your strategy of selecting a service/workshop for your car when needing regular maintenance?, **Q 28:** Would you consider paying for dedicated apps offered […]?, **Q 34:** Is your car connected?, **Q 39:** There is a debate whether legislation should, […]. What results would you expect from such regulations?
Bases: Germany: Total n= 1,000. **Source:** Statista Q 2023.

REGION I

8 in 10 assume that independent WSs are cheaper but as competent as car dealerships – Loyalty to local WSs is highest among those 45 and older

Top 5 statements about car repair/maintenance – by age
All respondents in %, top 2 and bottom 2 values shown



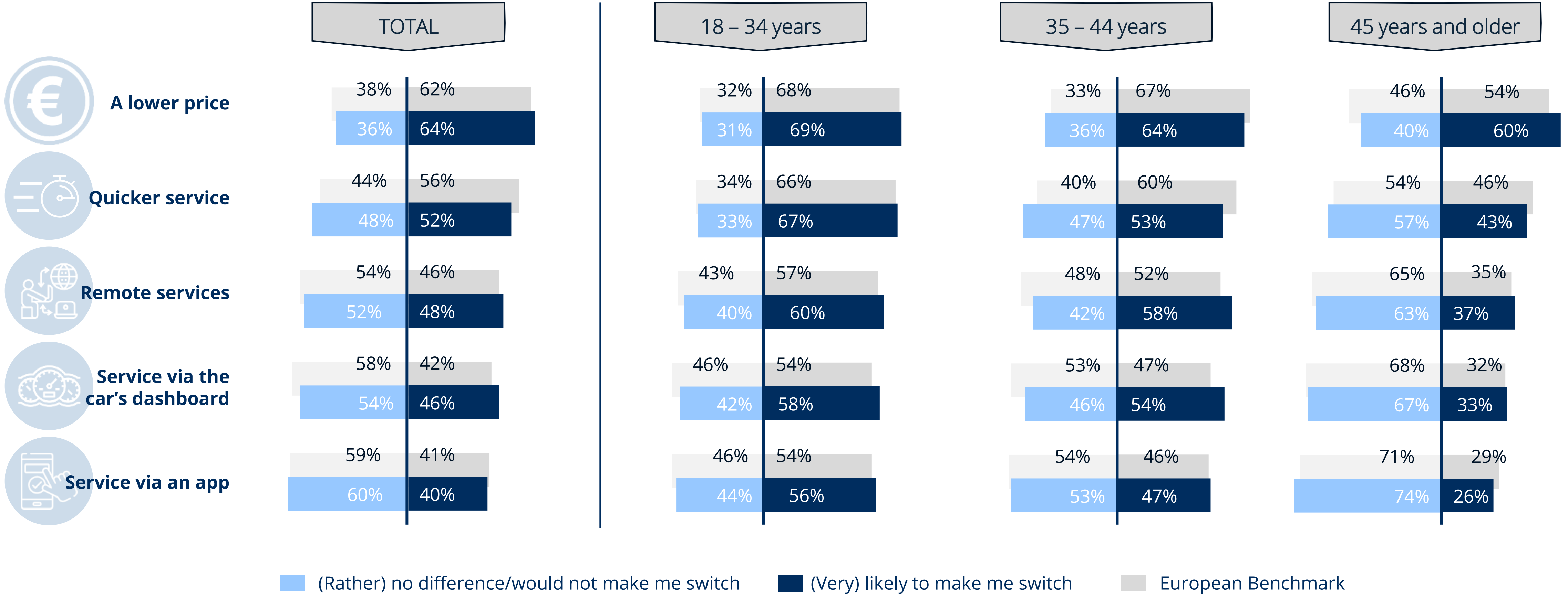
Question Q 19: For car repair/maintenance, to what extent would you agree with each of the following statements?
Bases: Germany: Total n= 1,000, 18 – 34 years n= 317, 35 – 44 years n= 208, 45 years and older n= 475; **Europe:** Total n= 11,011, 18 – 34 years n= 3,656, 35 – 44 years n= 2,542, 45 years and older n= 4,813. **Source:** Statista Q 2023.

REGION I

SMR Network

A lower price is reason to switch to independent WSs for 2 in 3; more than half switch for quicker services – Drivers under 35 y/o are more likely to switch

Arguments for switching workshop type: **manufacturer to independent** – by age
Respondents who prefer manufacturer networks/workshops in %, top 2 and bottom 2 values shown

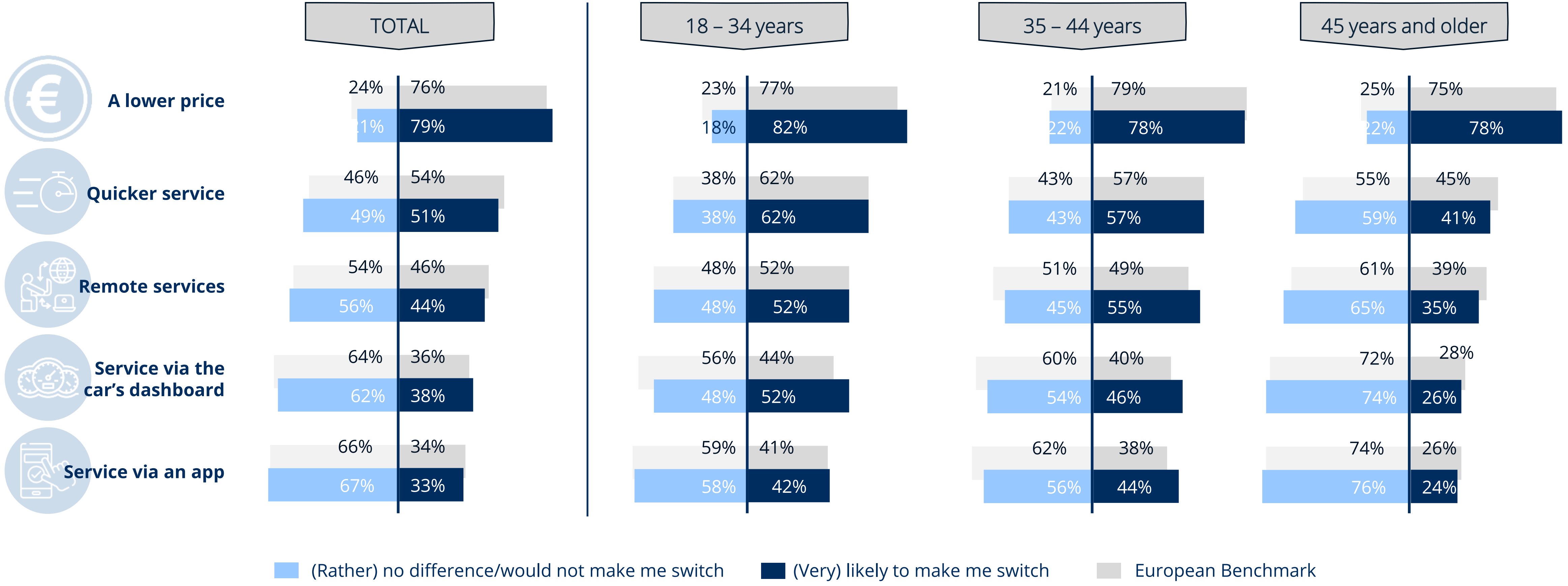


Question Q 20.1: How likely are you to switch to an independent workshop in the following situations? If the independent workshop...
Bases: Germany: Total n= 489, 18 – 34 years n= 151, 35 – 44 years n= 108, 45 years and older n= 230; **Europe:** Total n= 4,575, 18 – 34 years n= 1,440, 35 – 44 years n= 1,083, 45 years and older n= 2,052. **Source:** Statista Q 2023.

REGION I

By far the most relevant argument to switch to a manufacturer is a lower price, followed by a quicker service

Arguments for switching workshop type: **independent to manufacturer** – by age
Respondents who prefer independent networks/workshops in %, top 2 and bottom 2 values shown



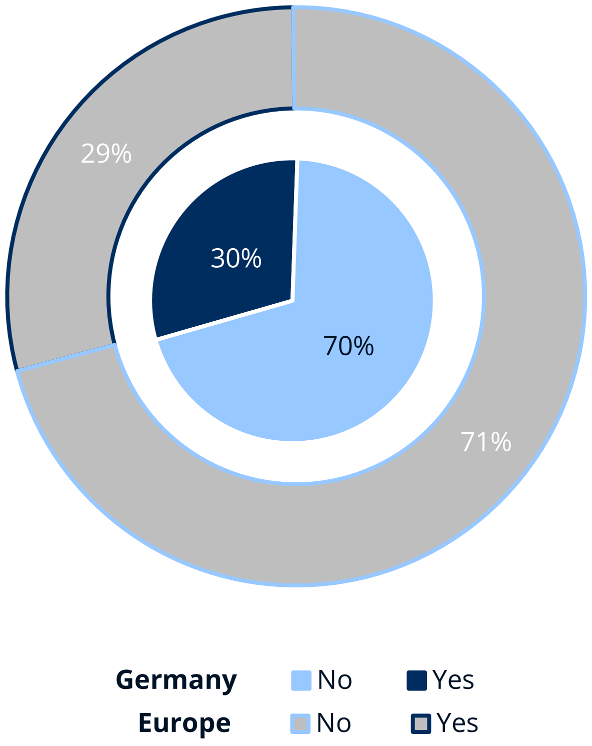
Question Q 20.2: How likely are you to switch to a manufacturer workshop in the following situations? If the manufacturer workshop....
Bases: Germany: Total n= 482, 18 – 34 years n= 151, 35 – 44 years n= 94, 45 years and older n= 237; **Europe:** Total n= 5,776, 18 – 34 years n= 1,919, 35 – 44 years n= 1,313, 45 years and older n= 2,544. **Source:** Statista Q 2023.

REGION I

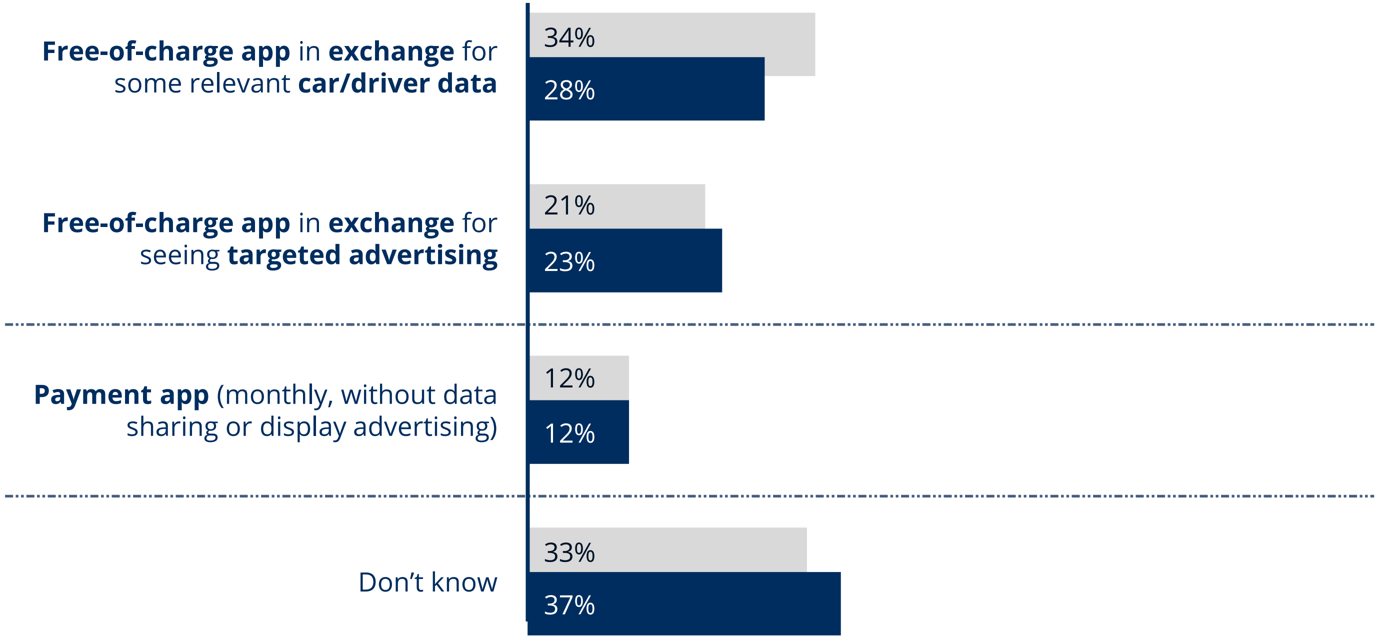
On par with the European average, 3 in 10 consider paying for car apps and free-of-charge app in exchange for driver data is the preferred alternative

Considering paying for dedicated car apps and preferred service model
All respondents in %

Considering paying for car apps



Preferred car app service model

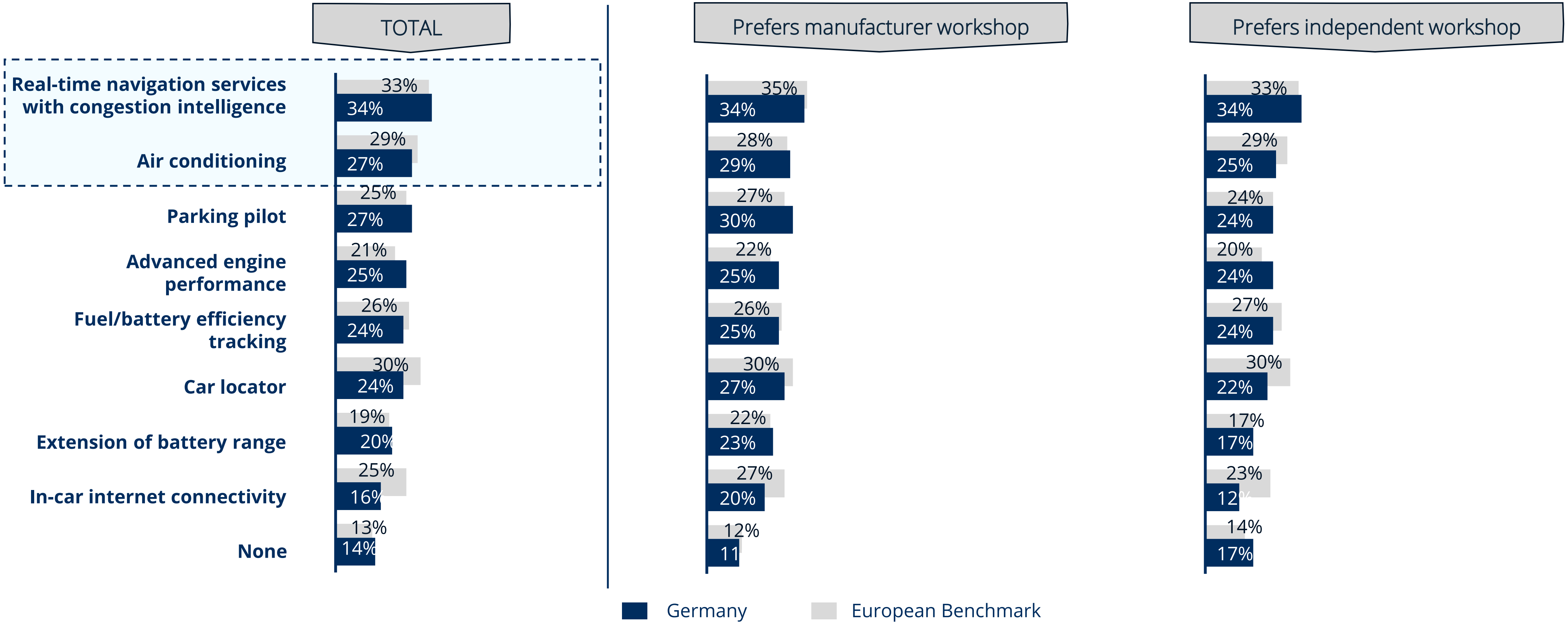


Question Q 28: Would you consider paying for dedicated apps offered exclusively for the cars display/screen?; **Question Q 29:** Dedicated car apps can be offered in various ways: Which of the following service models do you prefer?
Bases: Germany: Total n= 1,000; **Europe:** Total n= 11,011. **Source:** Statista Q 2023.

FIA REGION I

Overall low willingness to pay for services – German drivers show highest interest in real-time navigation and air conditioning

Services in a ‘connected car’ respondents are willing to pay for – by SMR workshop preference (DIY not displayed)
All respondents in %

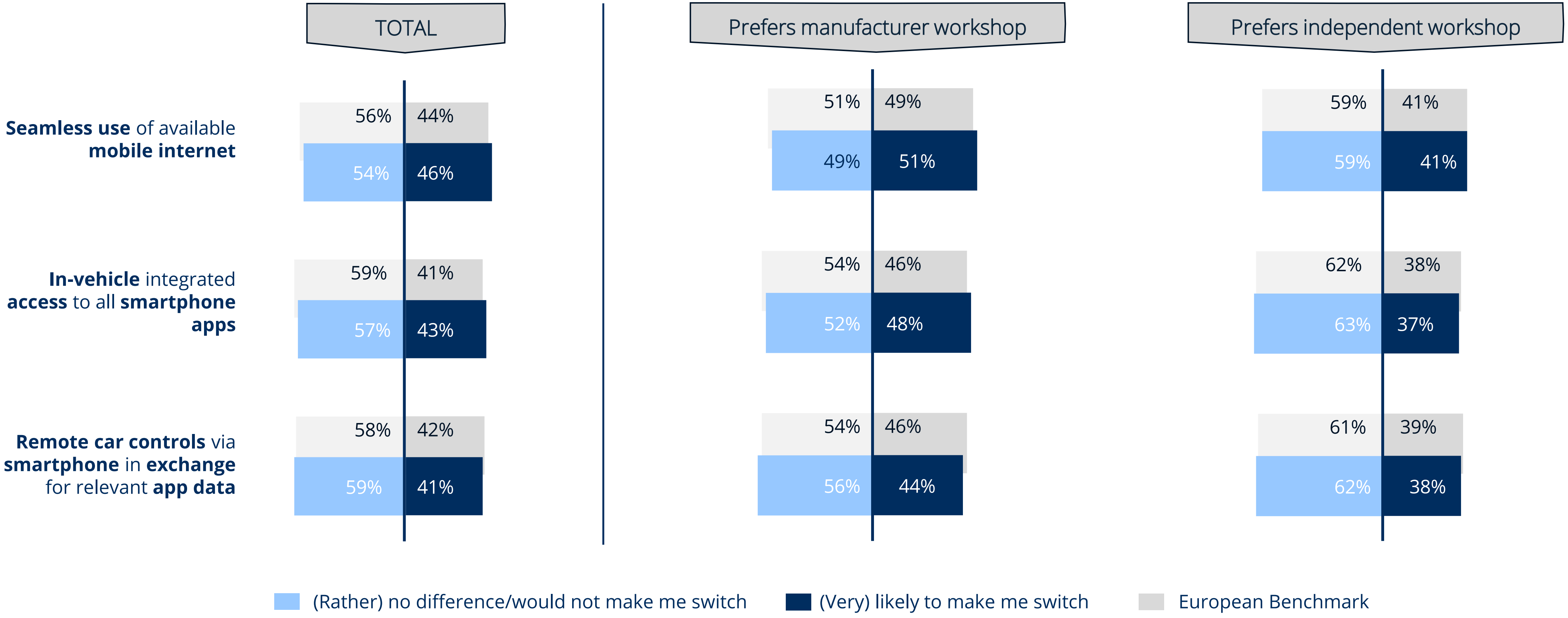


Question Q 32: For which of the following services in a ‘connected car’, would you generally be willing to pay a monthly amount?
Bases: Germany: Total n= 1,000, Prefers manufacturer workshop n= 489, Prefers independent workshop n= 482; **Europe:** Total n= 11,011, Prefers manufacturer workshop n= 4,575, Prefers independent workshop n= 5,776.
Source: Statista Q 2023.

REGION I

Less than half are willing to switch brands based on internet and app benefits – people who prefer manufacturer WSs are slightly more open to it

Willingness to switch the brand based on internet and app usage – by SMR workshop preference (DIY not displayed)
All respondents in %, top 2 and bottom 2 values shown



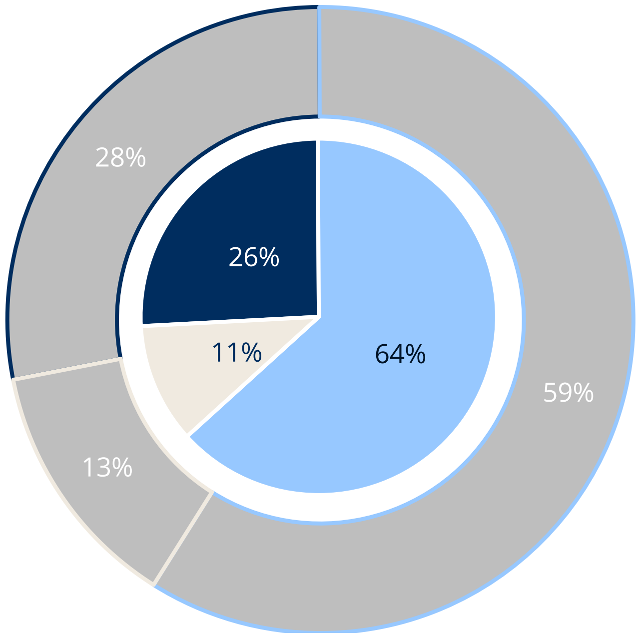
Question Q 31: To what degree would the following options with regards to the use of internet and apps make you consider to switch to another car brand? Another brand that...
Bases: Germany: Total n= 1,000, Prefers manufacturer workshop n= 489, Prefers independent workshop n= 482; **Europe:** Total n= 11,011, Prefers manufacturer workshop n= 4,575, Prefers independent workshop n= 5,776.
Source: Statista Q 2023.

REGION I

Most Germans want to be able to choose and switch telematics providers – Only slight differences compared to European average

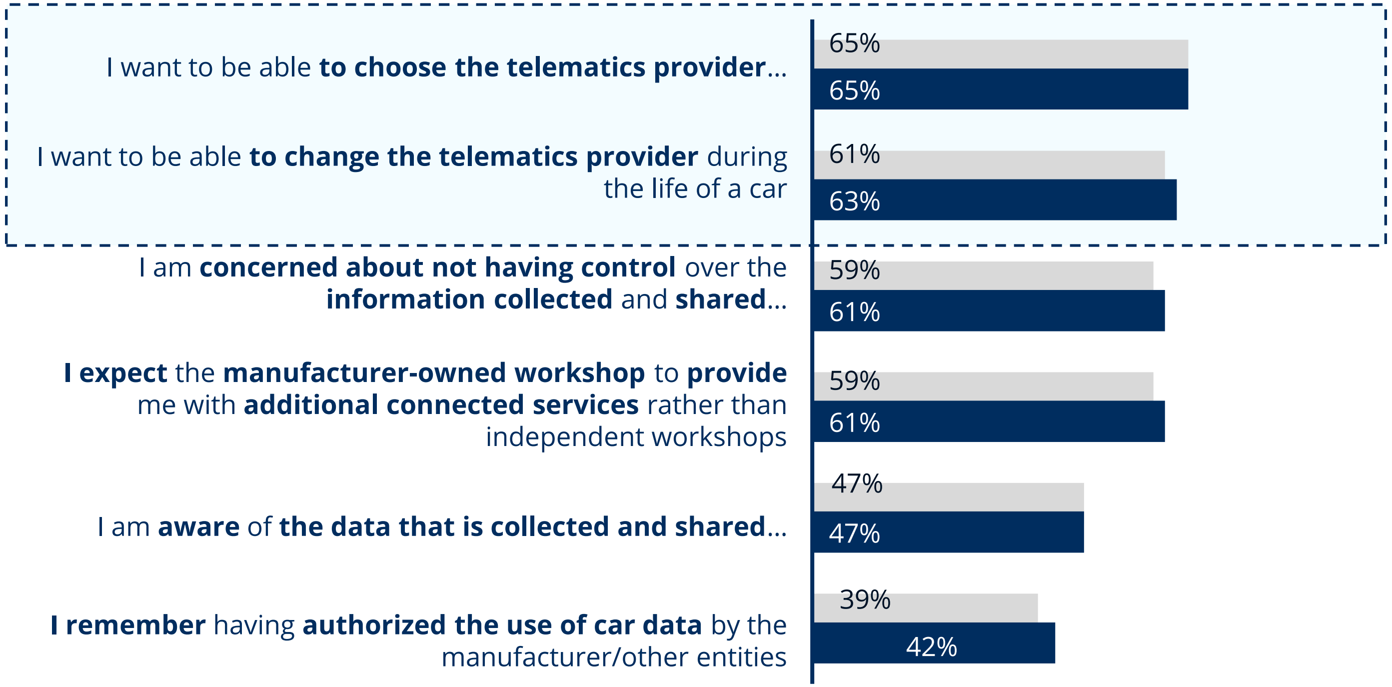
'Connected car' and telematics
All respondents in % top 2 values for Q35 shown

Is your car „connected"?



Germany No Yes Don't know
Europe No Yes Don't know

How far do you agree with the following statements?



(Strongly) agree European Benchmark

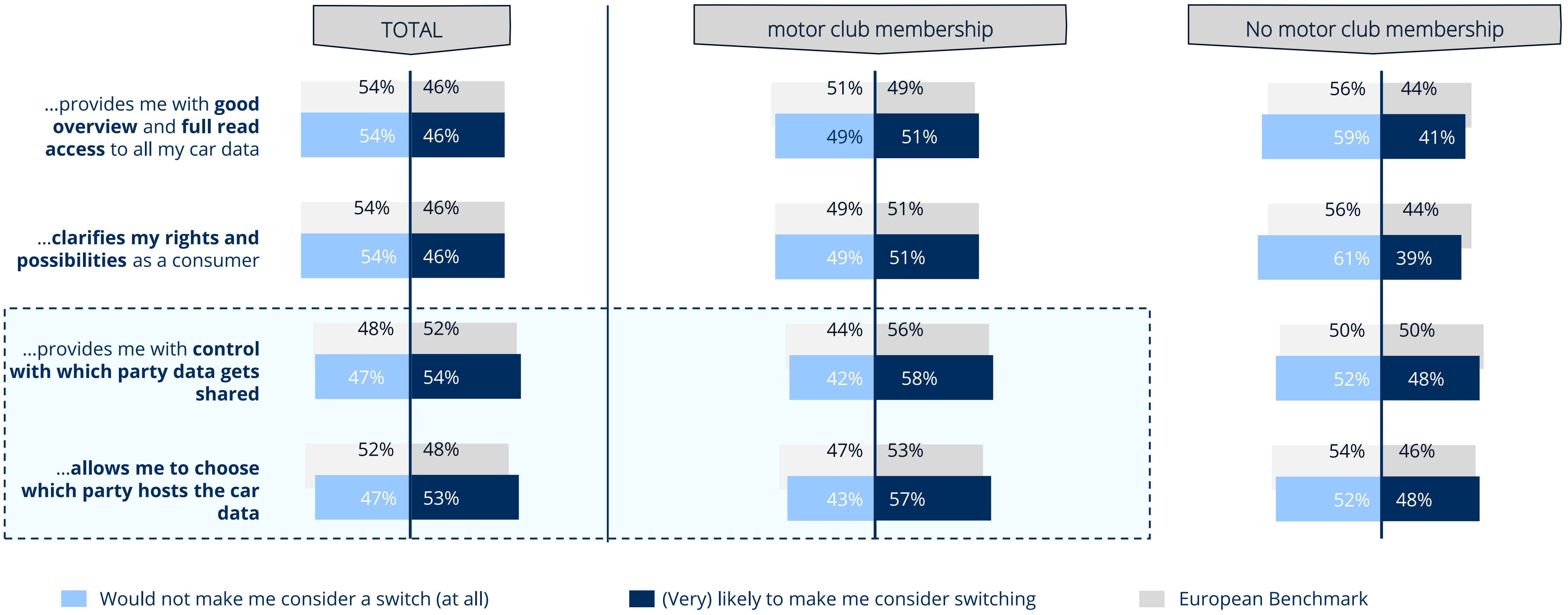
Question Q 34: Is your car "connected" (i.e. uses telematics)?; **Question Q 35:** How far do you agree with the following statements?
Bases: Germany: Total n= 1,000; **Europe:** Total n= 11,011. **Source:** Statista Q 2023.

FIA REGION I

More than half consider switching to a provider that grants them control over which data is shared or allows choosing who hosts the data

Willingness to switch the brand based on data sharing options – by motor club membership

All respondents in %, top 2 and bottom 2 values shown

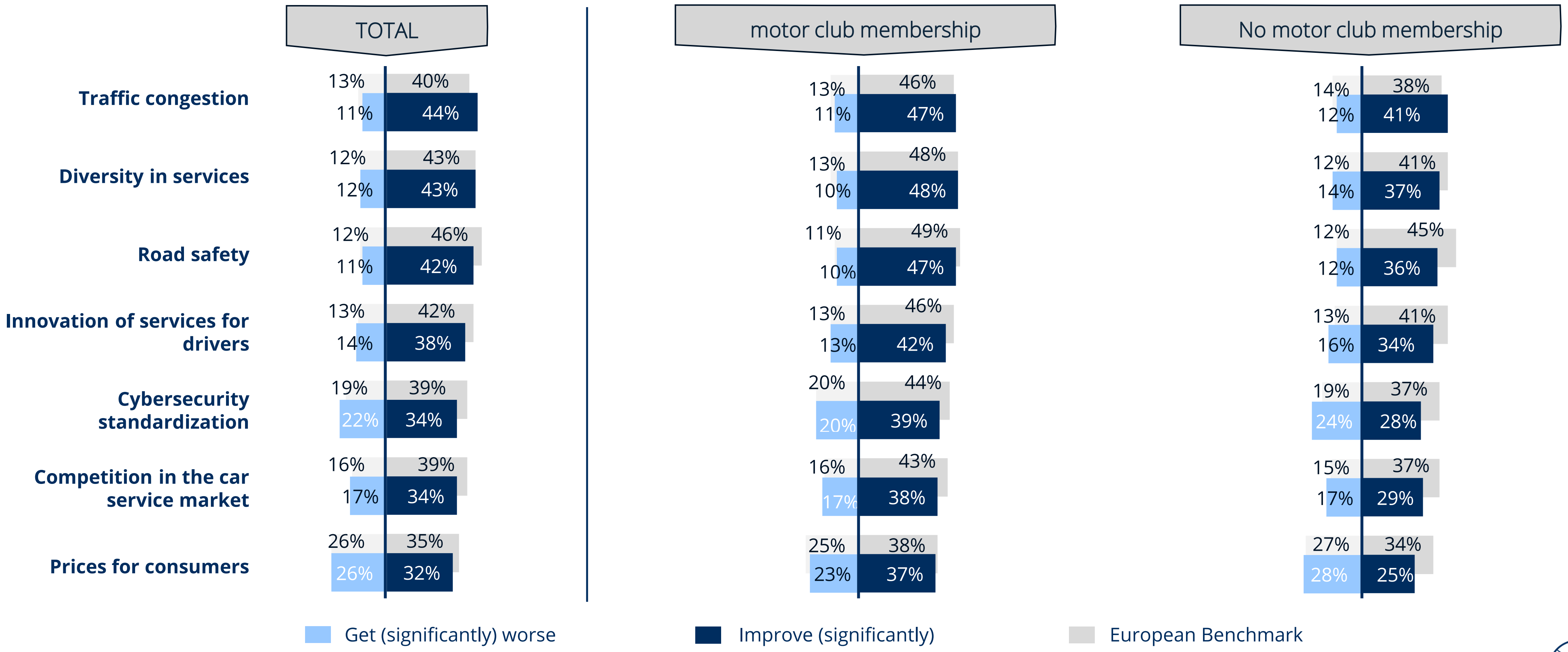


Question Q 38: To what degree would the following options with regards to usage of the car's data make you consider a switch to another car brand? Another brand that...
Bases: Germany: Total n= 1,000, motor club membership yes / no n= 537 / 463; **Europe:** Total n= 11,011, motor club membership yes / no n= 3,037 / 7,974. **Source:** Statista Q 2023.

REGION I

Germans are rather optimistic about the impact legislative regulations have, esp. on traffic congestion, service diversity, and road safety

Expectations about legislative regulation impact – by motor club membership
All respondents in %, top 2 and bottom 2 values shown



Question Q 39: There is a debate whether legislation should, as it did in banking, impose car manufacturers to grant qualified third parties automated data access when a car owner authorizes this. What results would you expect from such regulations?
Bases: Germany: Total n= 1,000, motor club membership yes / no n= 537 / 463; **Europe:** Total n= 11,011, motor club membership yes / no n= 3,037 / 7,974. **Source:** Statista Q 2023.

FIA REGION I

Country Deep Dive

Poland

Poland Management Summary

IN POLAND, **INDEPENDENT WORKSHOPS ARE PREFERRED**. HOWEVER, AFFORDABLE PRICES AND FAST SERVICE CAN STILL LEAD TO SWITCHING

- In Poland, **70%** of drivers **prefer independent workshops** over manufacturers. Correspondingly, independent workshops are perceived as **cheaper** but **equally as competent** as manufacturers. Still, six out of ten drivers choose the workshop based on the type of repair needed.
- The likeliness to **switch from a manufacturer to an independent** workshop **is quite high in Poland**, especially when cheaper and quicker services are offered. These factors are additionally increased among drivers who own a connected car.
- When it comes **to switching from independent to manufacturer workshops**, **price** can be a decisive factor. Over 60% would also consider switching when they get a quicker service.

POLISH DRIVERS SHOW A **HIGH WILLINGNESS TO PAY** FOR **CAR APPS** AND **CONNECTED CAR FEATURES**

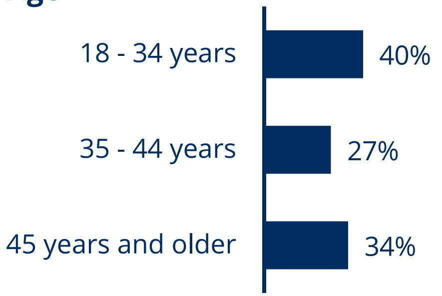
- About **four out of ten** Polish drivers generally consider **paying for car apps**. However, the **preferred** car app service model is **free-of-charge in exchange for driver data.**
- More than every fifth Pole drives a **connected car**. It is generally important for them to be **able to choose** and **switch telematics providers**. Also, **data security** is a relevant topic. Polish drivers are more **open to paying for connected car services** than their European neighbors.
- In Poland, the **willingness** to **switch brands** due to data sharing options or internet and app usage is **above the European Benchmark**. Additionally, this willingness is even higher among those willing to pay for car apps.
- Legislative regulations are largely associated with positive expectations. Those with a positive attitude are in general more open to technological developments **leading to a higher interest in connected services.**

1 in 5 Poles drives a connected car – often directly purchased; Over 1/3 is willing to pay for car apps and just as many are optimistic about legislative impact

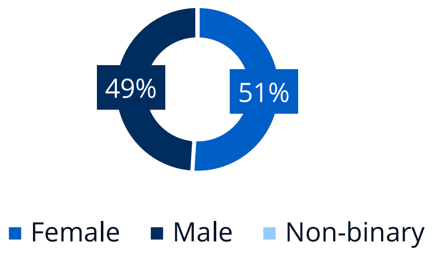
Country Characteristics Poland

SOCIODEMOGRAPHICS & MEMBERSHIP

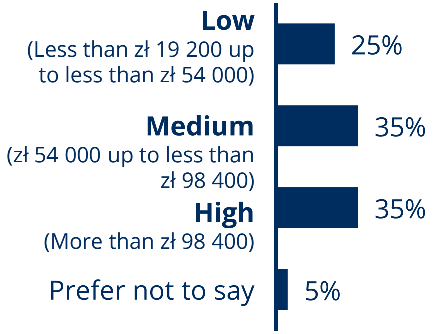
Age



Gender



Income



Motor club Membership

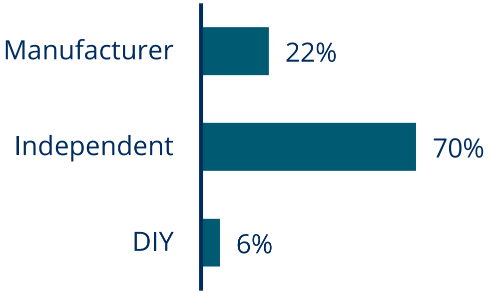
7% Yes

No **93%**

VEHICLE & ATTITUDE

Vehicle Ownership

SMR Preference



Vehicle Age

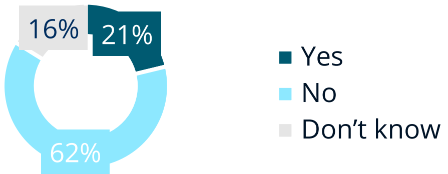
7 years (Median)

Willingness to Pay for Car Apps

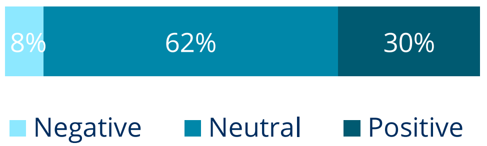
38% Yes

No **63%**

Connected Car



Attitude towards (Legislative) Market Development

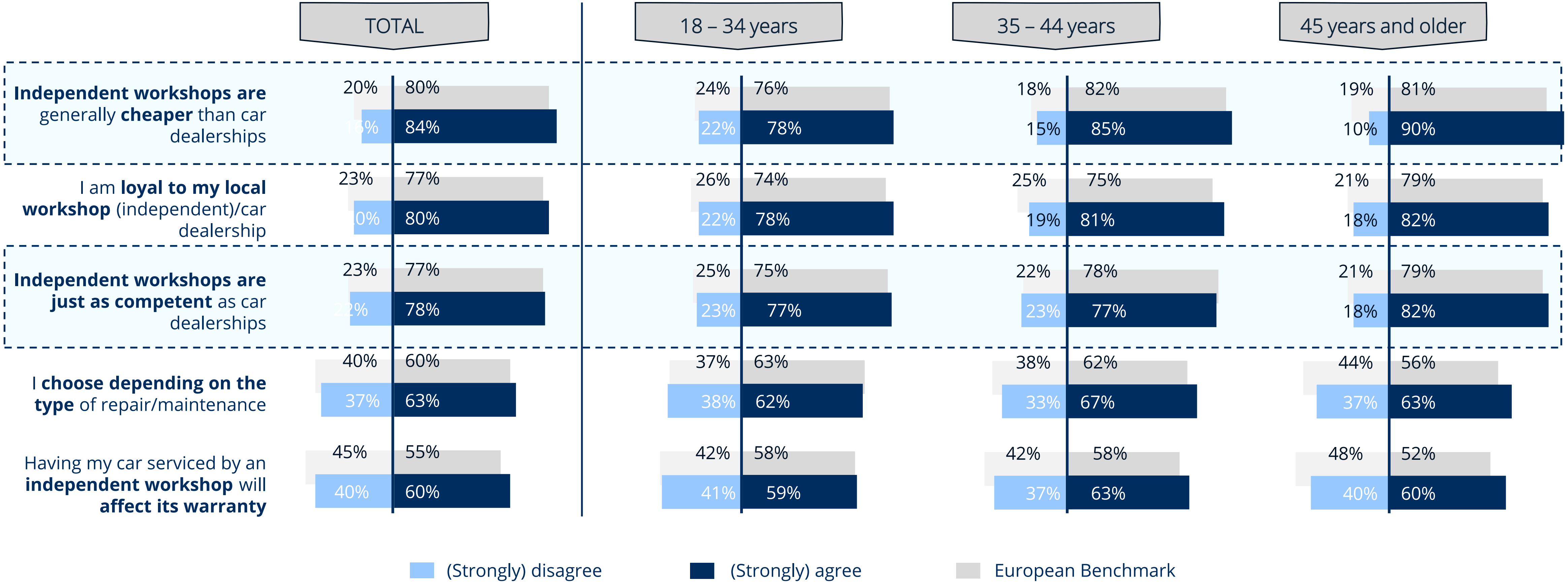


Question Q 1: What is your gender?, **Q 2:** How old are you?, **Q 10:** How old is your car?, **Q 40:** About how high is the annual gross income that your household has at its disposal, before tax and contributions?, **Q 43:** Are you currently member of motorist club?, **Q 11:** How did you acquire your car?, **Q 15:** What is your strategy of selecting a service/workshop for your car when needing regular maintenance?, **Q 28:** Would you consider paying for dedicated apps offered [...]?, **Q 34:** Is your car connected?, **Q 39:** There is a debate whether legislation should, [...]. What results would you expect from such regulations?
Bases: Poland: Total n= 1,000. **Source:** Statista Q 2023.

REGION I

Independent workshops are considered to be cheaper and equally competent, especially by Polish drivers age 45 and older

Top 5 statements about car repair/maintenance – by age
All respondents in %, top 2 and bottom 2 values shown

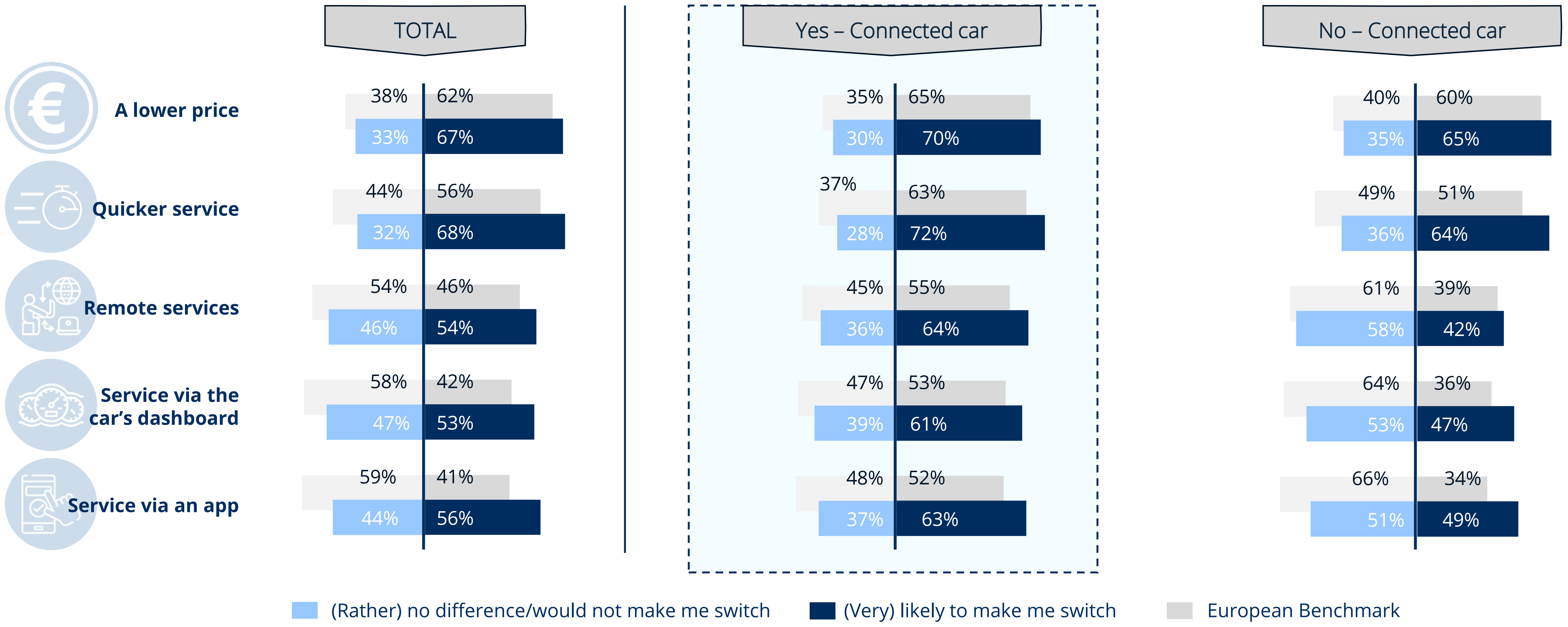


Question Q 19: For car repair/maintenance, to what extent would you agree with each of the following statements?
Bases: Poland: Total n= 1,000, 18-34 years n= 395, 35-44 years n= 269, 45 years and older n= 336; **Europe:** Total n= 11,011, 18-34 years n= 3,656, 35-44 years n= 2,542, 45 years and older n= 4,813. **Source:** Statista Q 2023.

REGION I

Above benchmark: Owners of connected cars are more likely to switch to independent WSs – drivers without are only convinced by lower prices & speed

Arguments for switching workshop type: **manufacturer to independent** – by car connectivity ('don't know' not displayed)
Respondents who prefer manufacturer networks/workshops in %, top 2 and bottom 2 values shown



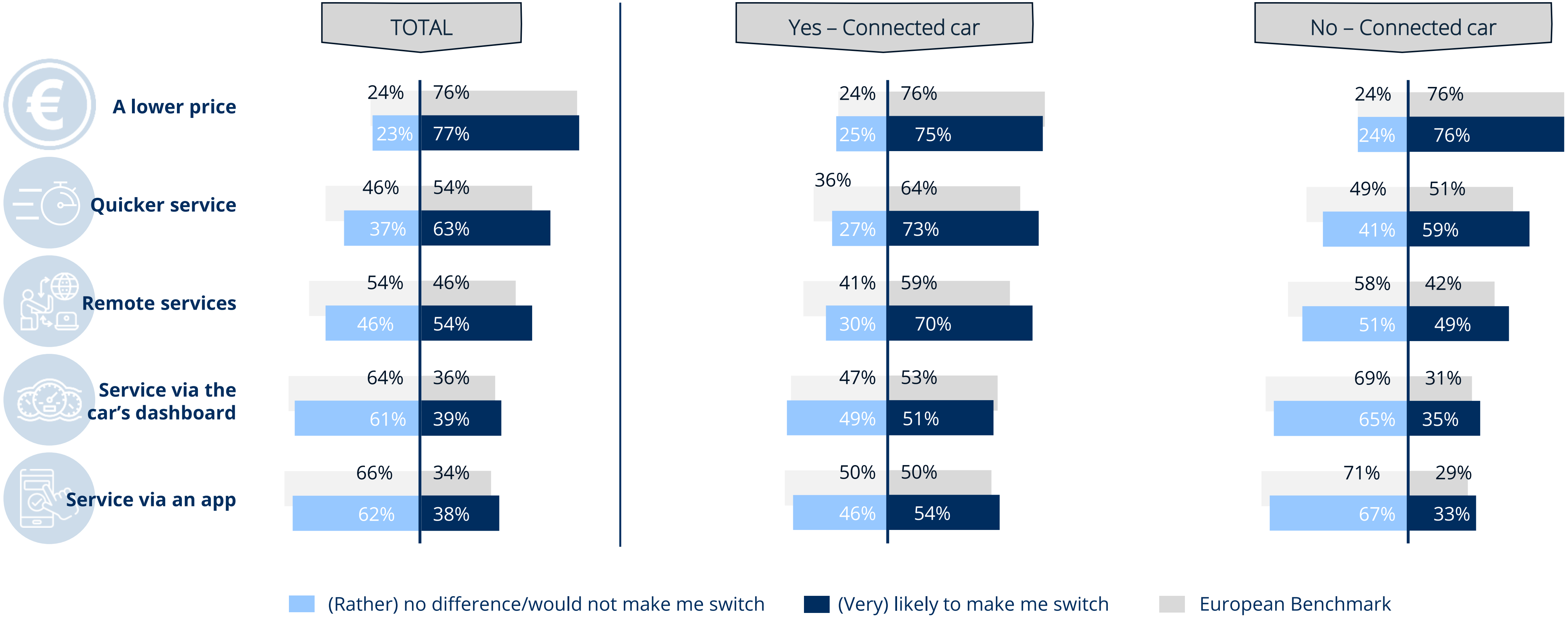
Question Q 20.1: How likely are you to switch to an independent workshop in the following situations? If the independent workshop...
Bases: Poland: Total n= 223, Connected Car yes / no n= 105 / 85; **Europe:** Total n= 4,575, Connected Car yes / no n= 1,823 / 2,117. **Source:** Statista Q 2023.

FIA REGION I

SMR Network

Service speed and remote services entice switching to manufacturers; Connected drivers are more likely to switch

Arguments for switching workshop type: **independent to manufacturer** – by car connectivity
Respondents who prefer independent networks/workshops in %, top 2 and bottom 2 values shown



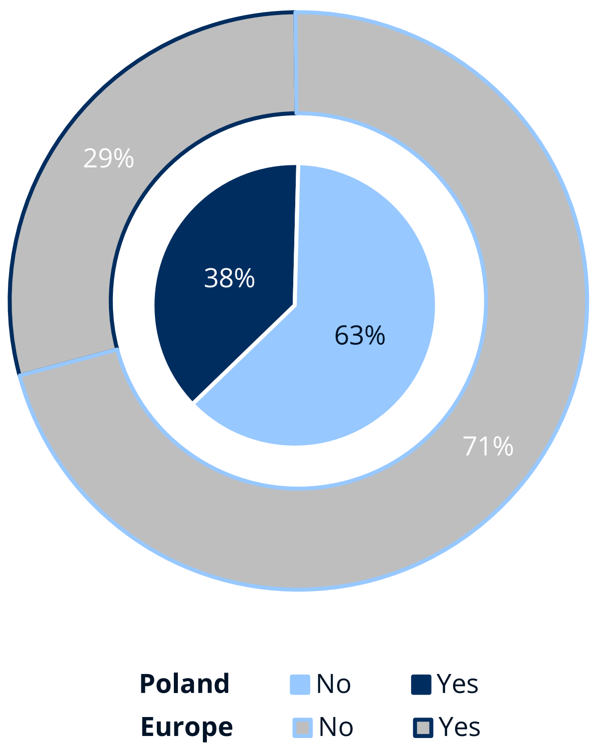
Question Q 20.2: How likely are you to switch to a manufacturer workshop in the following situations? If the manufacturer workshop….
Bases: Poland: Total n= 696, Connected Car yes / no n= 99 / 489; **Europe:** Total n= 5,776, Connected Car yes / no n= 1,123 / 3,940. **Source:** Statista Q 2023.
.

REGION I

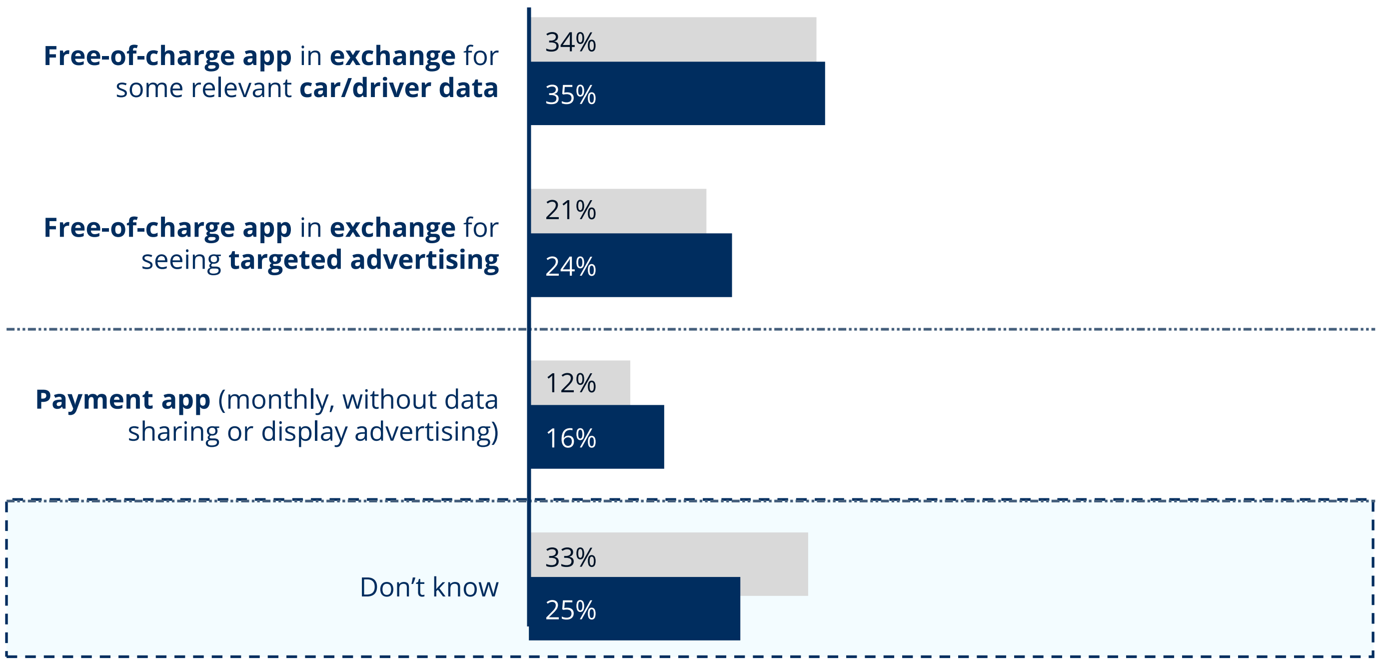
Polish drivers show a higher willingness to pay for cap apps and, accordingly, fewer are undecided than in the rest of Europe

Considering paying for dedicated car apps and preferred service model
All respondents in %

Considering paying for car apps



Preferred car app service model



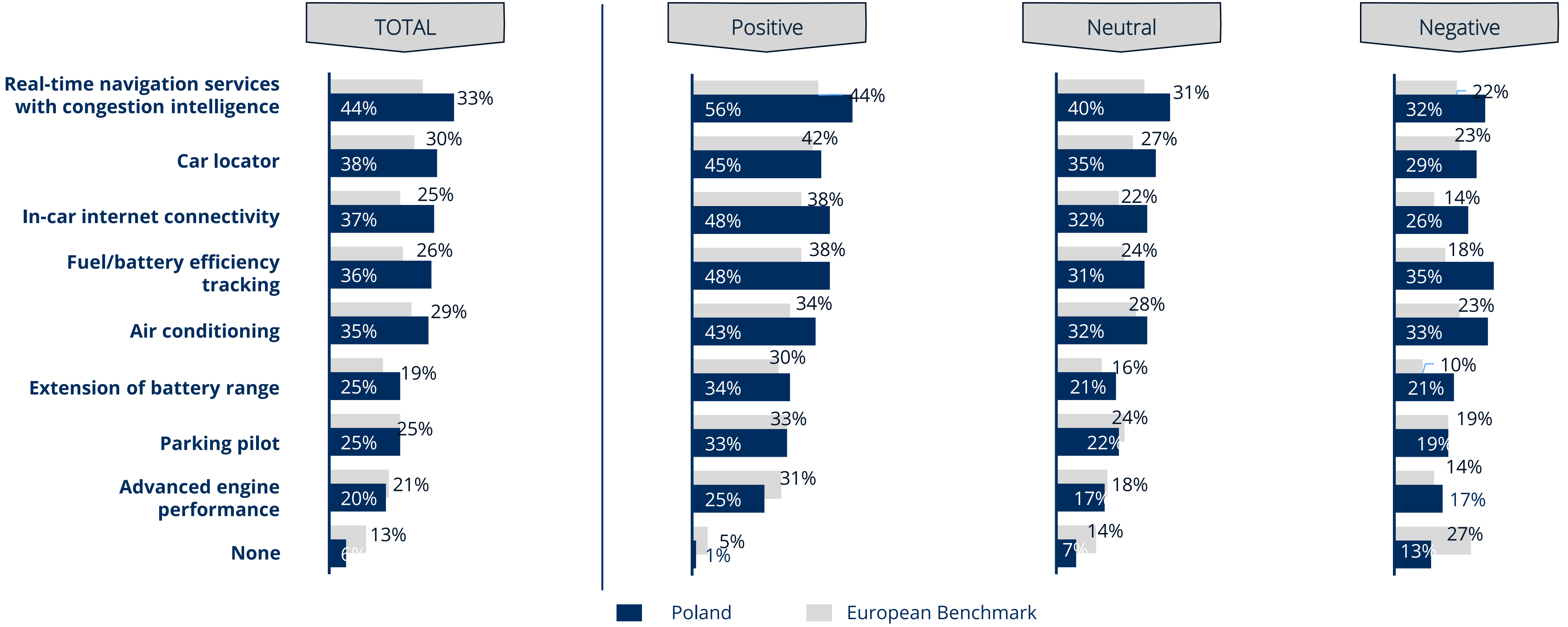
Question Q 28: Would you consider paying for dedicated apps offered exclusively for the cars display/screen?; **Question Q 29:** Dedicated car apps can be offered in various ways: Which of the following service models do you prefer?
Bases: Poland: Total n= 1,000; **Europe:** Total n= 11,011. **Source:** Statista Q 2023.

FIA REGION I

In-vehicle Apps

Clearly above benchmark: Connectivity services are consistently more popular in Poland

Services in a 'connected car' respondents are willing to pay for – by attitude towards (legislative) market developments
All respondents in %

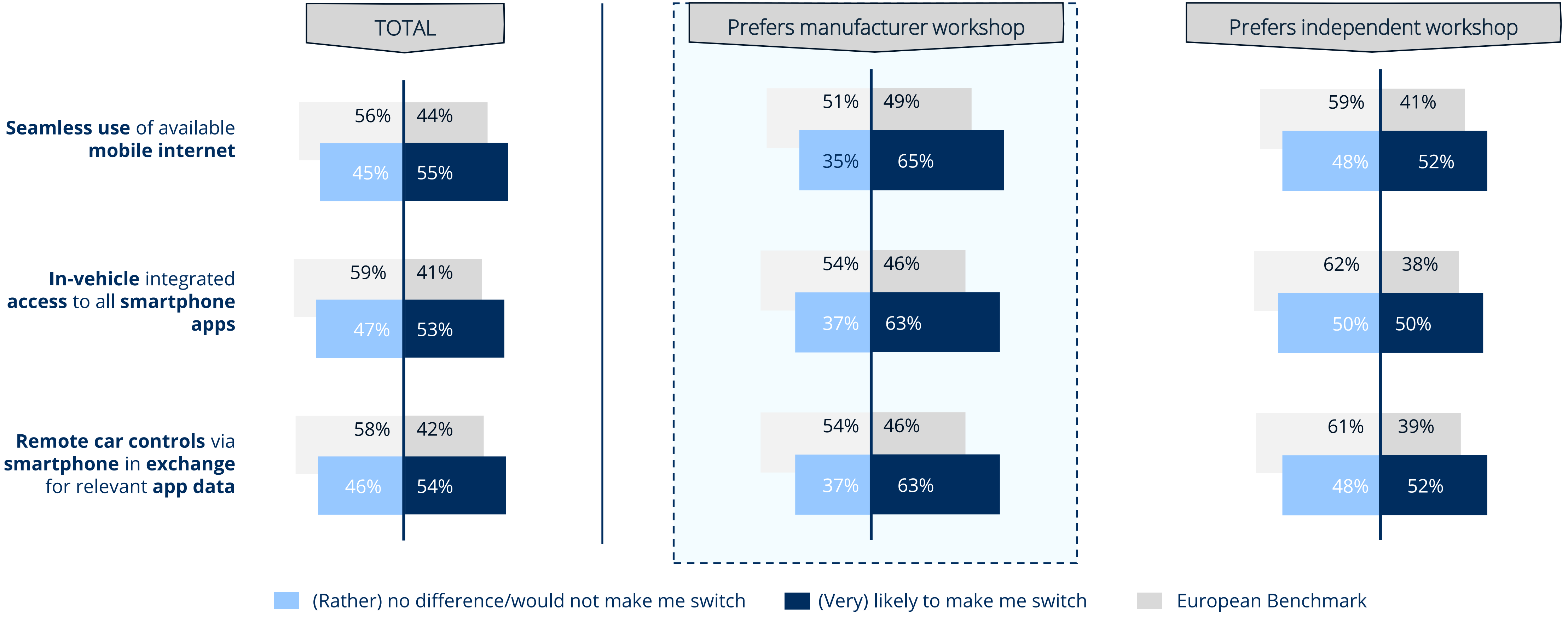


Question Q 32: For which of the following services in a 'connected car', would you generally be willing to pay a monthly amount?
Subgroups for attitude towards (legislative) market developments are calculated based on the average of Q39 (1, 2=Get (significantly) worse; 3=Remain unchanged; 4,5=Improve (significantly): Positive > 3.9, Neutral = 2.5 to 3.9, Negative < 2.5.
Bases: Poland: Total n= 1,000, Positive n= 302, Neutral n= 620, Negative n= 78; **Europe:** Total n= 11,011, Positive n= 2,344, Neutral n= 7,574, Negative n= 1,093. **Source:** Statista Q 2023.

REGION I

Switching to a brand that provides seamless internet and app usage is more likely in Poland; Among manufacturer preferers there is even a higher tendency

Willingness to switch the brand based on internet and app usage – by SMR workshop preference (DIY not displayed)
All respondents in %, top 2 and bottom 2 values shown



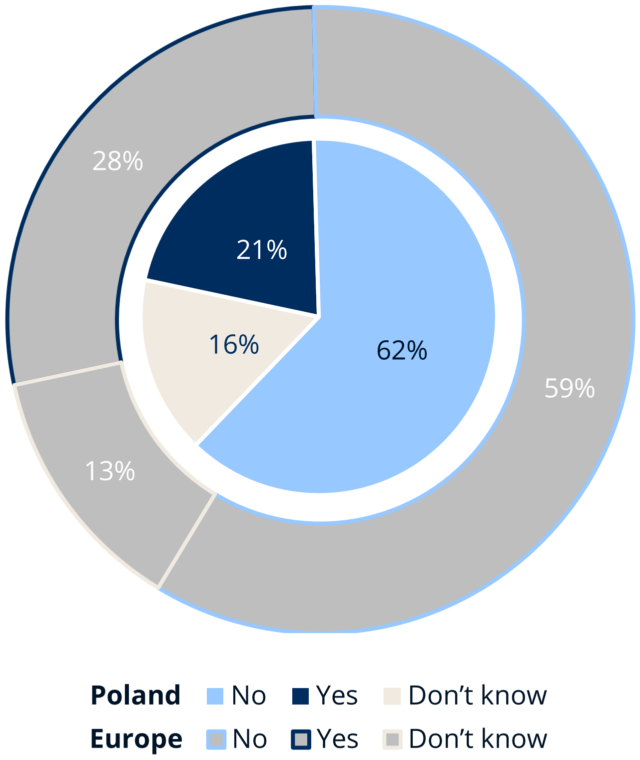
Question Q 31: To what degree would the following options with regards to the use of internet and apps make you consider to switch to another car brand? Another brand that...
Bases: Poland: Total n= 1,000, Prefers manufacturer workshop n= 223, Prefers independent workshop n= 696; **Europe:** Total n= 11,011, Prefers manufacturer workshop n= 4,575, Prefers independent workshop n= 5,776.
Source: Statista Q 2023.

REGION I

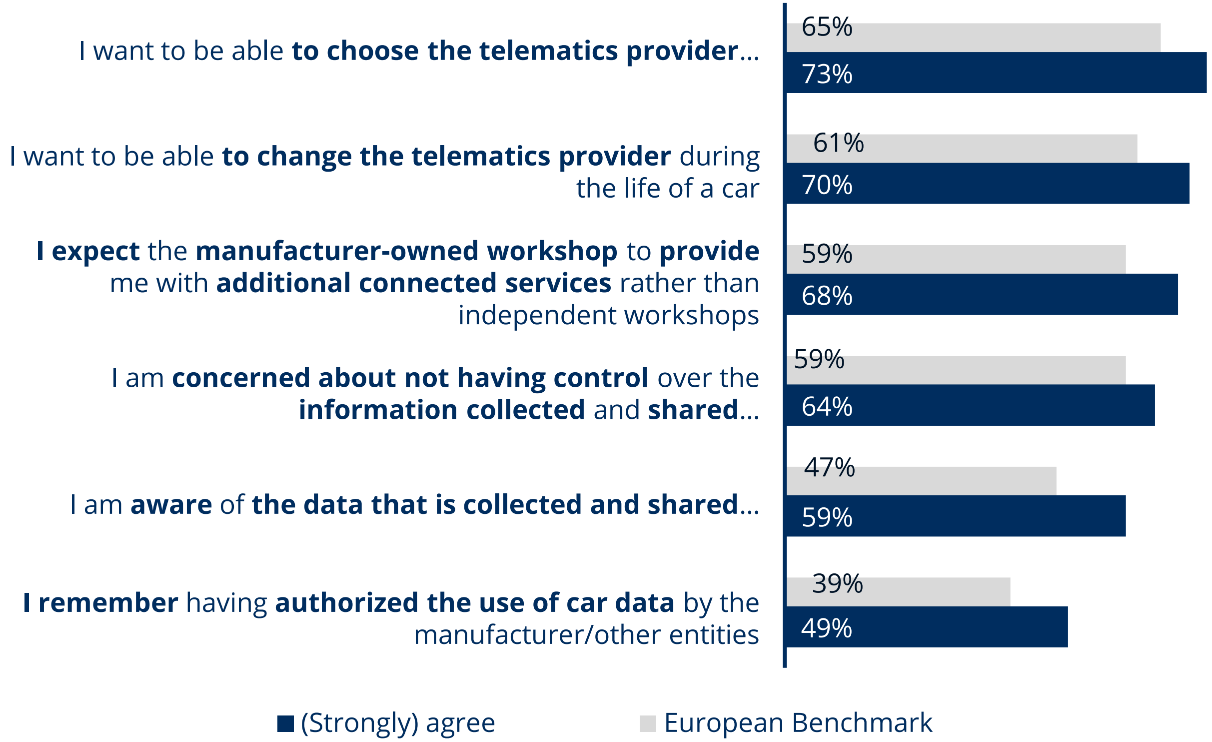
In Poland, connected cars are less prevalent – provider selection and adaption are highly relevant; Manufacturers are expected to provide connectivity services

'Connected car' and telematics
All respondents in % top 2 values for Q35 shown

Is your car „connected"?



How far do you agree with the following statements?

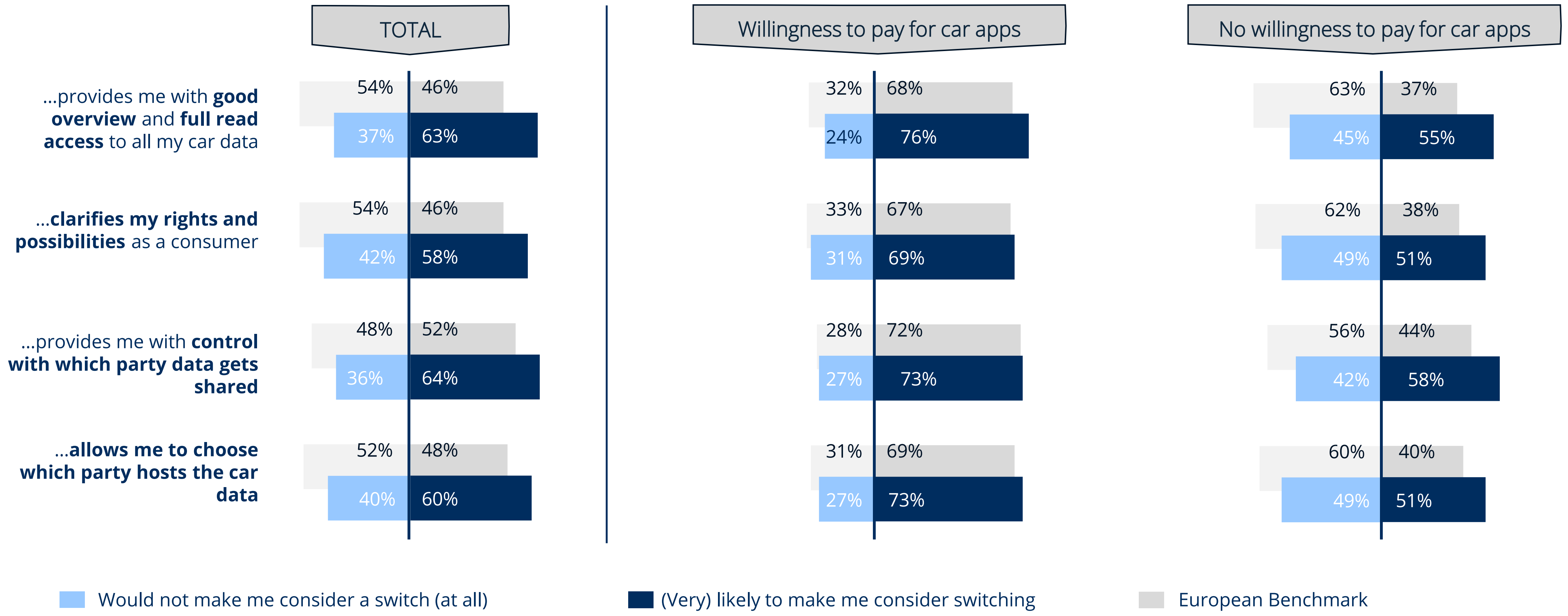


Question Q 34: Is your car "connected" (i.e. uses telematics)?; **Question Q 35:** How far do you agree with the following statements?
Bases: Poland: Total n= 1,000; **Europe:** Total n= 11,011. **Source:** Statista Q 2023.

FIA REGION I

Consistently above the European benchmark: Polish car drivers are more likely to switch based on data sharing options

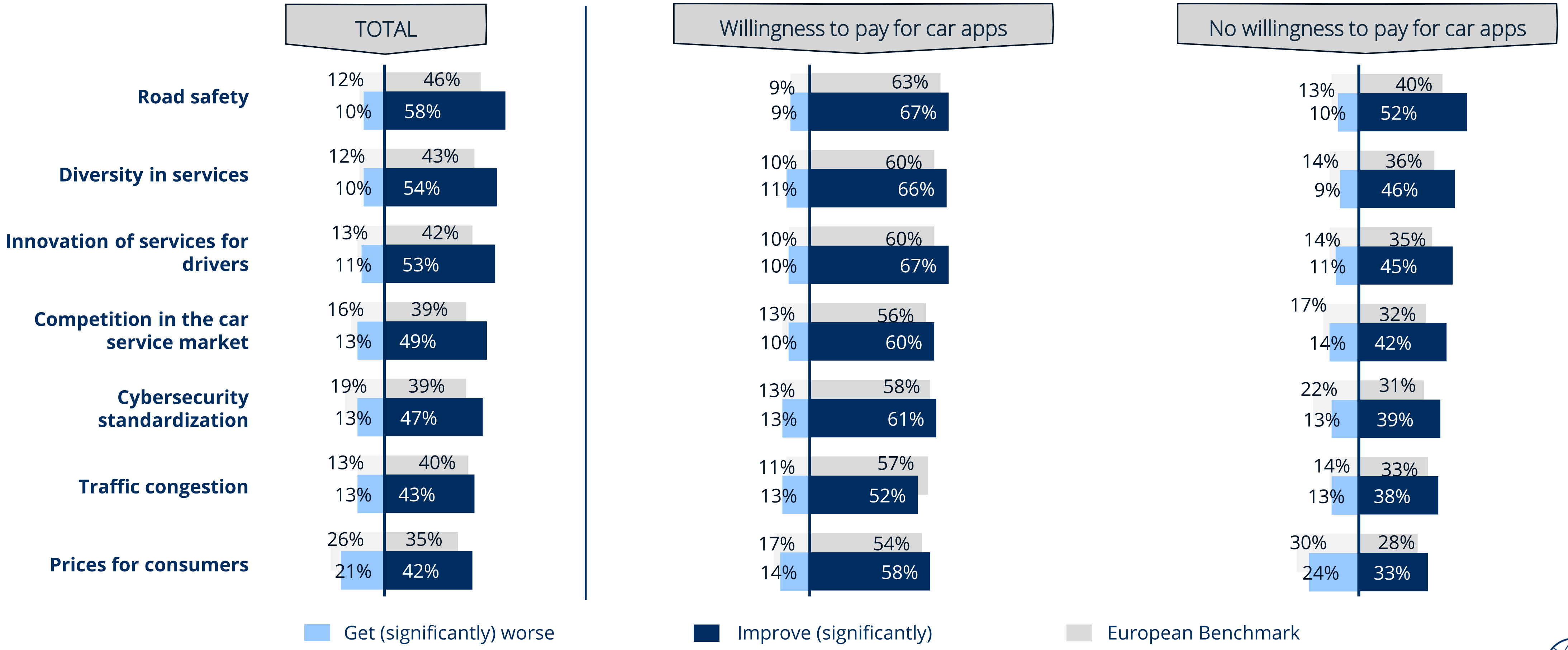
Willingness to switch the brand based on data sharing options – by willingness to pay for car apps
All respondents in %, top 2 and bottom 2 values shown



Question Q 38: To what degree would the following options with regards to usage of the car's data make you consider a switch to another car brand? Another brand that...
Bases: Poland: Total n= 1,000, Willingness to pay for car apps yes / no n= 375 / 625; **Europe:** Total n= 11,011, Willingness to pay for car apps yes / no n= 3,179 / 7,832. **Source:** Statista Q 2023.

Poles are optimistic: legislation will promote safety, diversity, and innovation – Particularly, drivers willing to pay for car apps have faith in the impact

Expectations about legislative regulation impact – by willingness to pay for car apps
All respondents in %, top 2 and bottom 2 values shown



Question Q 39: There is a debate whether legislation should, as it did in banking, impose car manufacturers to grant qualified third parties automated data access when a car owner authorizes this. What results would you expect from such regulations?
Bases: Poland: Total n= 1,000, Willingness to pay for car apps yes / no n= 375 / 625; **Europe:** Total n= 11,011, Willingness to pay for car apps yes / no n= 3,179 / 7,832. **Source:** Statista Q 2023

REGION I

Country Deep Dive
Belgium

Belgium Management Summary

BELGIAN INDEPENDENT NETWORKS STRUGGLE TO CONVINCE LOYAL CONSUMERS THROUGH THEIR QUICK AND REMOTE SERVICES

- Overall, **manufacturer and independent workshop networks** are **equally preferred** in Belgium. **Independent workshops** are perceived to **be equally competent** and **cheaper**.
- However, **drivers preferring manufacturers** for their SMR **stay loyal** to their workshop: only half of the respondents would switch to independent networks based on lower prices and quicker services.
- On the other hand, **Belgians servicing their car at independent workshops** are **less loyal** – ¾ would switch to a manufacturer for a lower price. High-incomes are even more likely to switch (when being offered quicker and remote services).

BELGIANS ARE RESERVED: ALTHOUGH DATA CONCERNS ARE PRONOUNCED, CONTROL OPTIONS DO NOT CONVINCE

- Nearly one in five Belgians would consider paying for a dedicated car app. While the **free-of-charge app** is the **most popular** service model, more than **one in three remains undecided**.
- Overall, **Belgian drivers are reluctant** to **pay** for **connected services**. Those with a **positive attitude** about regulations are generally more open to technological developments **and, as a result, show a higher willingness to purchase** and **switch brands** based on connectivity – but still lower than the average European optimist.
- With ¼ connected car drivers, Belgium is within the European benchmark. Although Belgians **struggle with data concerns**, **data control** does **not necessarily convince** them to switch to another brand.
- Finally, drivers **expect improvements in safety and innovation/diversity** through **regulations** – but not necessarily for prices and competition.

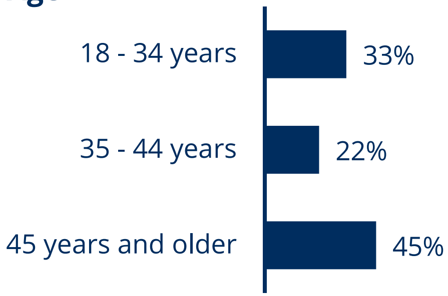
REGION I

The majority of Belgians drive an outright purchased car without connectivity; Nearly one out of four is motor club member

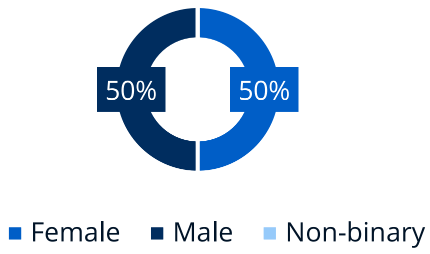
Country Characteristics Belgium

SOCIODEMOGRAPHICS & MEMBERSHIP

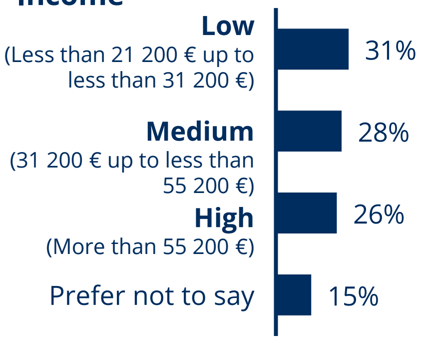
Age



Gender



Income



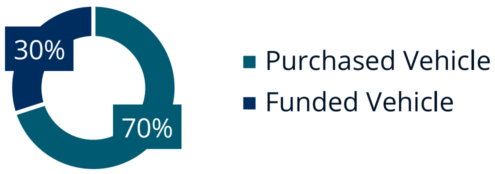
Motor club Membership

23% Yes

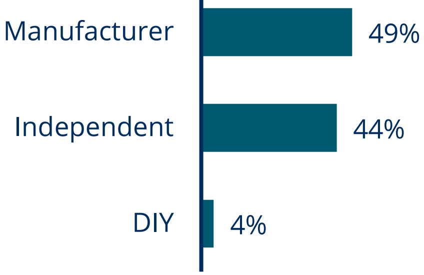
No **77%**

VEHICLE & ATTITUDE

Vehicle Ownership



SMR Preference



Vehicle Age

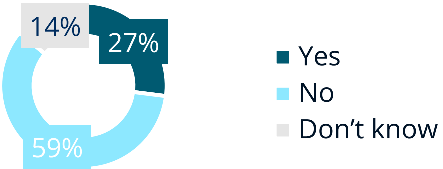
6 years (Median)

Willingness to Pay for Car Apps

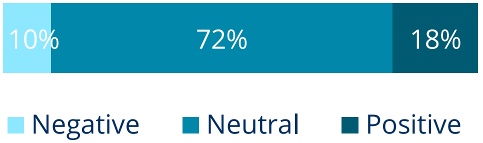
19% Yes

No **81%**

Connected Car



Attitude towards (Legislative) Market Development



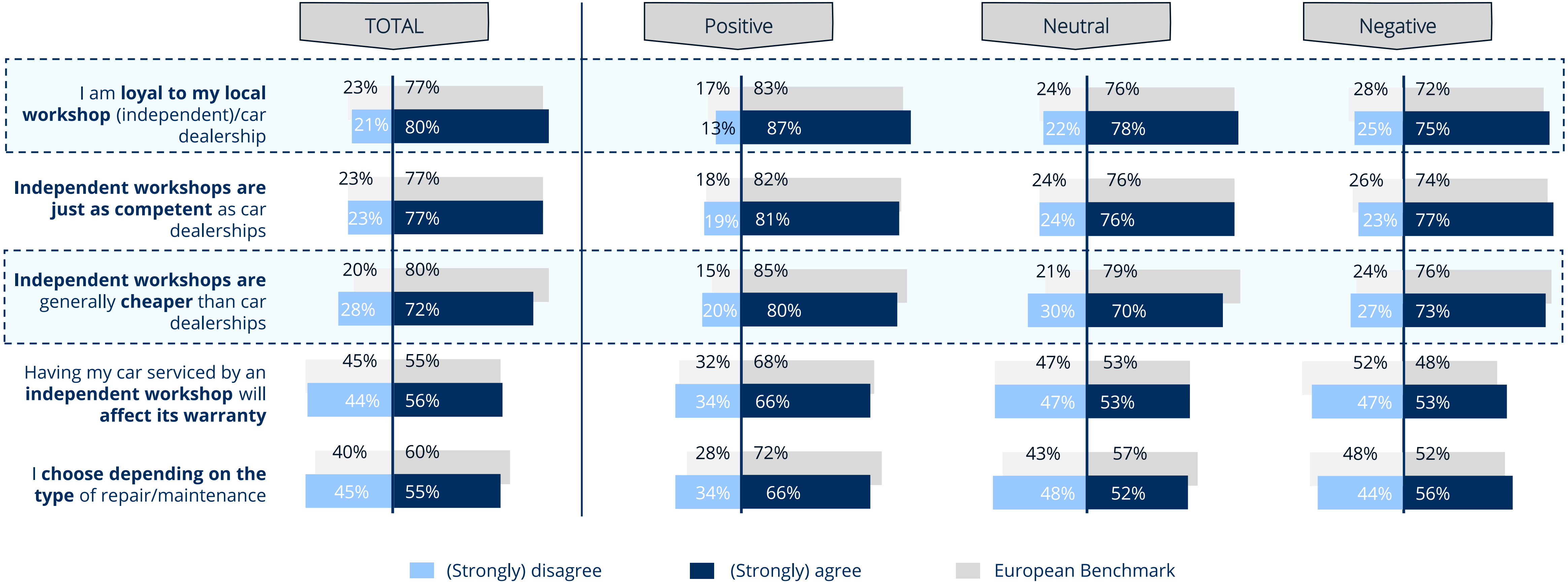
Question Q 1: What is your gender?, **Q 2:** How old are you?, **Q 10:** How old is your car?, **Q 40:** About how high is the annual gross income that your household has at its disposal, before tax and contributions?, **Q 43:** Are you currently member of motorist club?, **Q 11:** How did you acquire your car?, **Q 15:** What is your strategy of selecting a service/workshop for your car when needing regular maintenance?, **Q 28:** Would you consider paying for dedicated apps offered […]?, **Q 34:** Is your car connected?, **Q 39:** There is a debate whether legislation should, […]. What results would you expect from such regulations?
Bases: Belgium: Total n= 1,000. **Source:** Statista Q 2023.

REGION I

SMR Network

Belgians are more loyal to their local WS – Independent WSs are perceived as cheaper, although less pronounced than the European benchmark

Top 5 statements about car repair/maintenance – by attitude towards (legislative) market developments
All respondents in %, top 2 and bottom 2 values shown

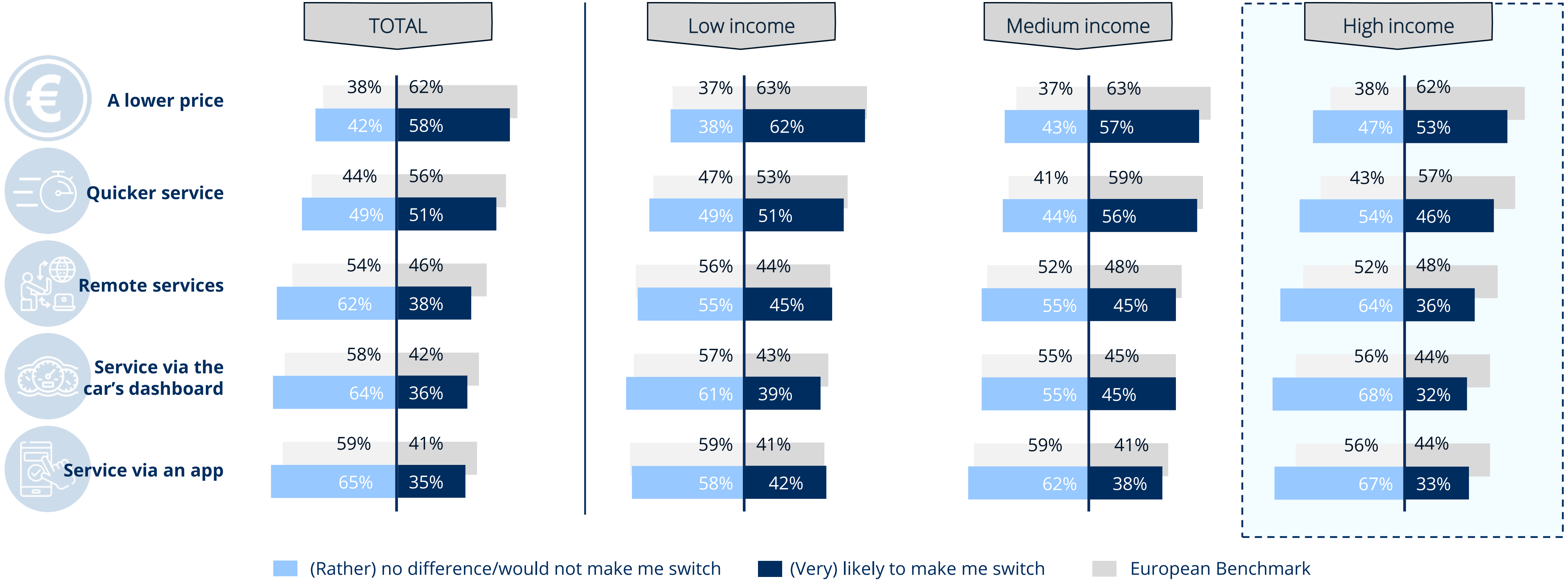


Question Q 19: For car repair/maintenance, to what extent would you agree with each of the following statements?
Subgroups for attitude towards (legislative) market developments are calculated based on the average of Q39 (1, 2=Get (significantly) worse; 3=Remain unchanged; 4,5=Improve (significantly): Positive > 3.9, Neutral = 2.5 to 3.9, Negative < 2.5.
Bases: Belgium: Total n= 1,000, Positive n= 183, Neutral n= 718, Negative n= 99; **Europe:** Total n= 11,011, Positive n= 2,344, Neutral n= 7,574, Negative n= 1,093. **Source:** Statista Q 2023.

REGION I

Willingness to switch workshop type varies: especially high-income manufacturer customers hesitate to switch

Arguments for switching workshop type: **manufacturer to independent** – by income
Respondents who prefer manufacturer networks/workshops in %, top 2 and bottom 2 values shown

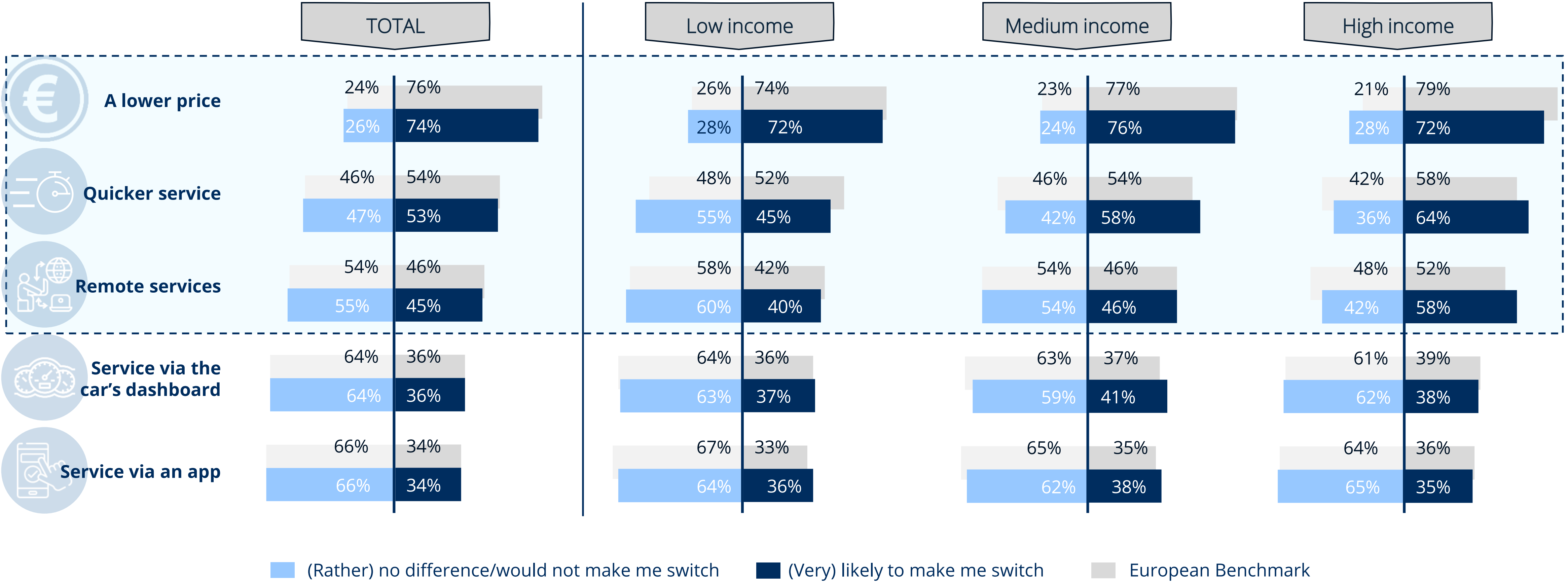


Question Q 20.1: How likely are you to switch to an independent workshop in the following situations? If the independent workshop...
Bases: Belgium: Total n= 492, Low income n= 130, Medium income n= 130, High income n= 150; **Europe:** Total n= 4,575, Low income n= 1,007, Medium income n= 1,455, High income n= 1,767. **Source:** Statista Q 2023.

FIA REGION I

A lower price convinces independent WS preferers to switch – quicker and remote services attract primarily those with high-income

Arguments for switching workshop type: **independent to manufacturer** – by income
Respondents who prefer independent networks/workshops in %, top 2 and bottom 2 values shown



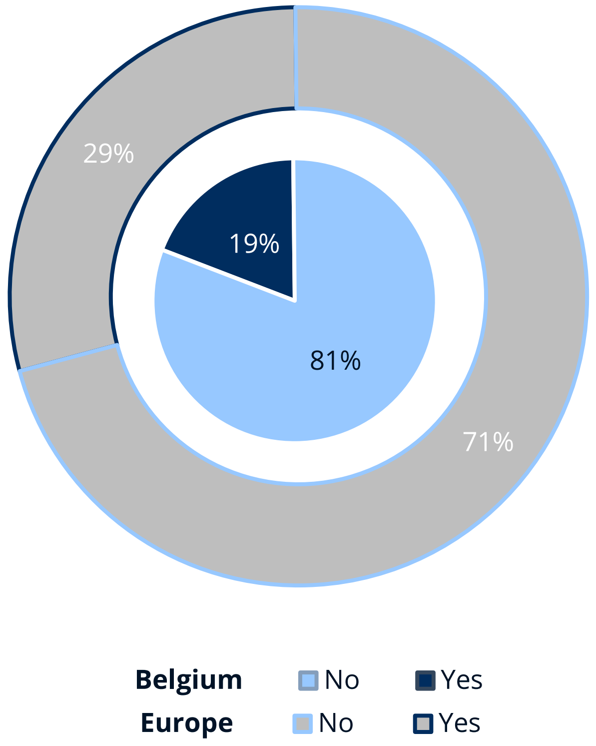
Question Q 20.2: How likely are you to switch to a manufacturer workshop in the following situations? If the manufacturer workshop....
Bases: Belgium: Total n= 442, Low income n= 154, Medium income n= 130 , High income n= 101; **Europe:** Total n= 5,776, Low income n= 1,708, Medium income n= 1,973, High income n= 1,614. **Source:** Statista Q 2023

REGION I

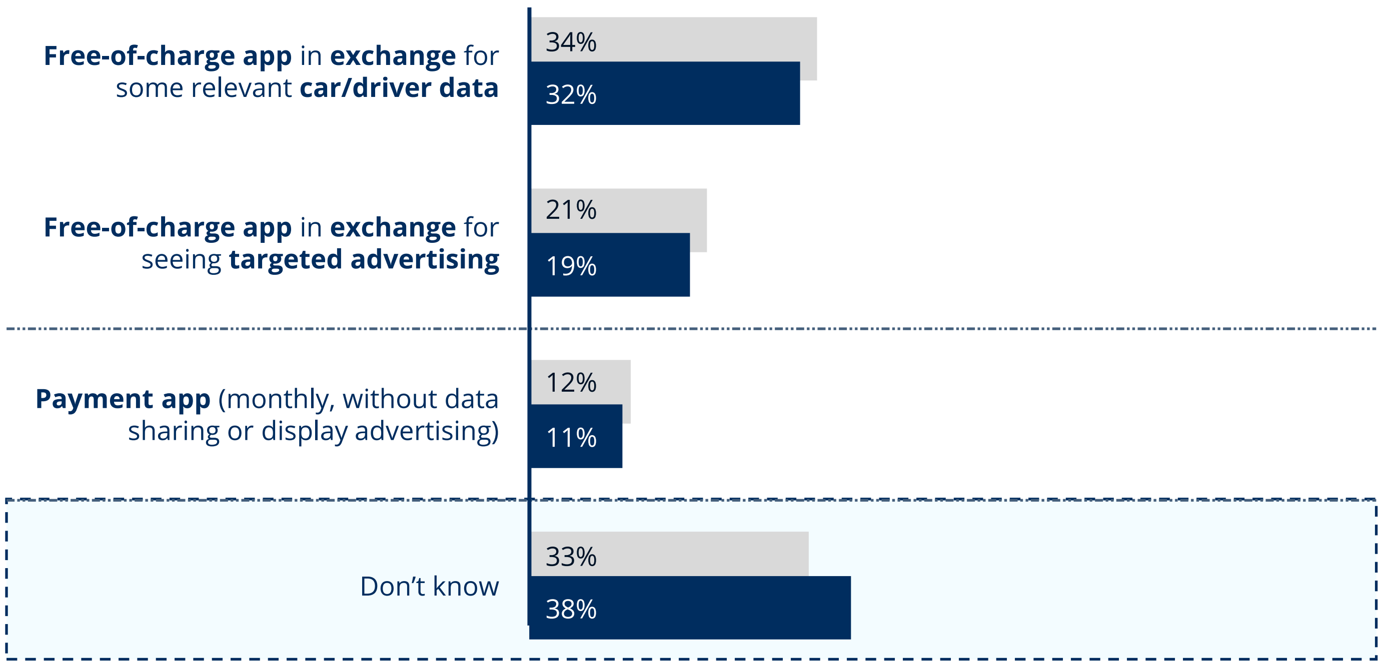
Below the European benchmark: 1 in 5 Belgians would pay for a car app and most of them are hesitant when it comes to the service model

Considering paying for dedicated car apps and preferred service model
All respondents in %

Considering paying for car apps



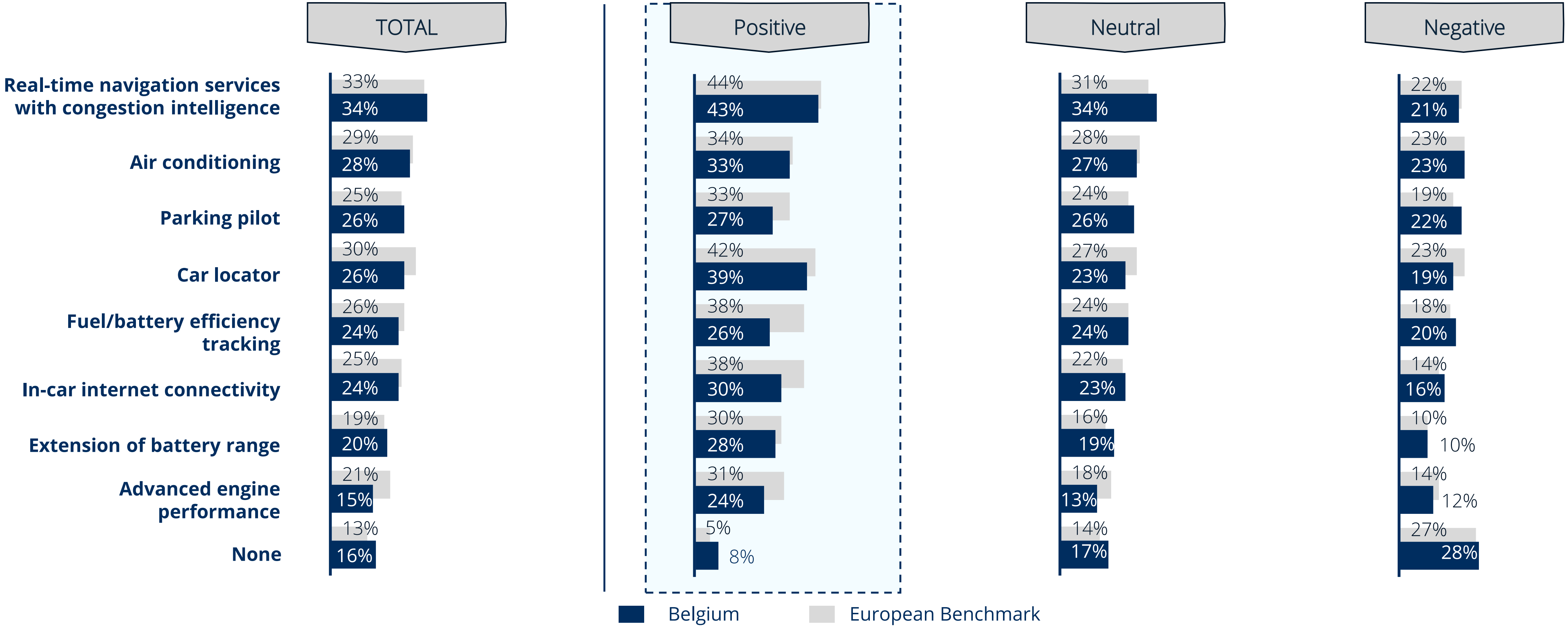
Preferred car app service model



Question Q 28: Would you consider paying for dedicated apps offered exclusively for the cars display/screen?; **Question Q 29:** Dedicated car apps can be offered in various ways: Which of the following service models do you prefer?
Bases: Belgium: Total n= 1,000; **Europe:** Total n= 11,011. **Source:** Statista Q 2023.

Real-time navigation, air conditioning, and parking pilot attract Belgians' attention – Preferences of drivers with positive legislative attitudes deviate

Services in a 'connected car' respondents are willing to pay for – by attitude towards (legislative) market developments
All respondents in %

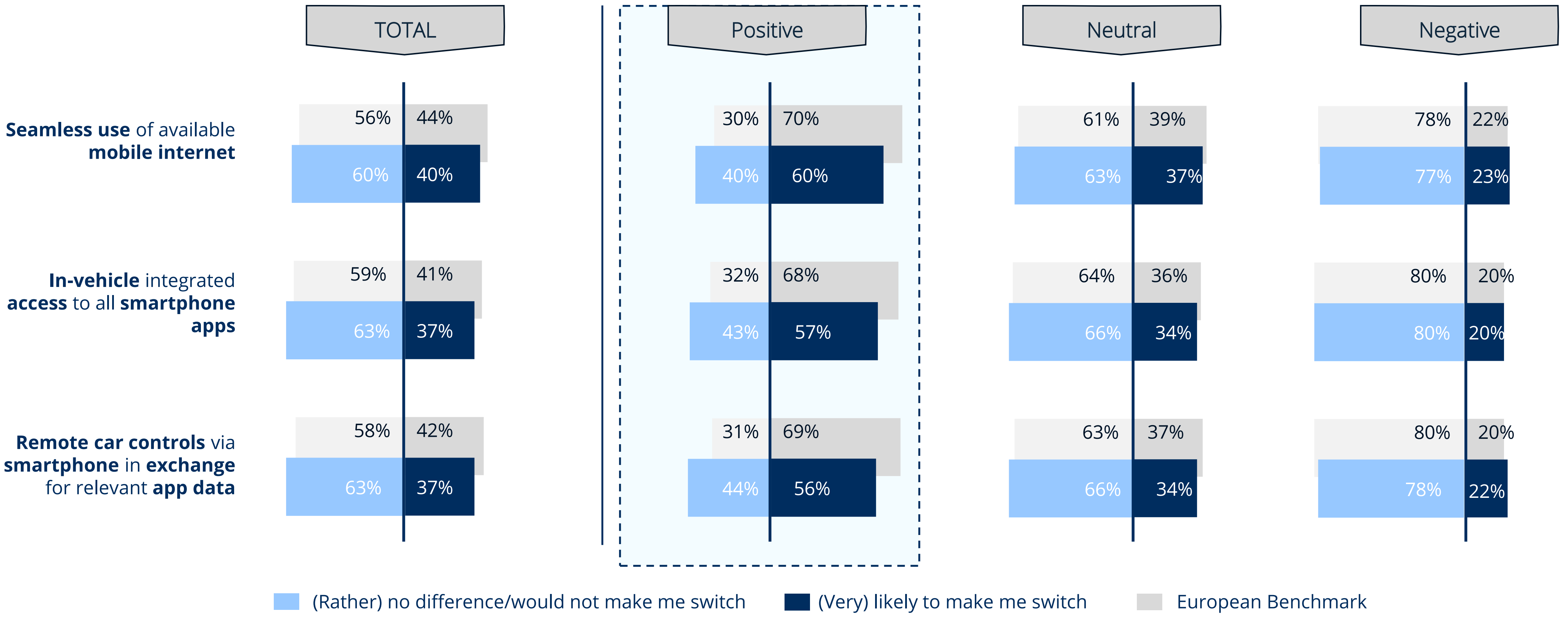


Question Q 32: For which of the following services in a 'connected car', would you generally be willing to pay a monthly amount?
Subgroups for attitude towards (legislative) market developments are calculated based on the average of Q39 (1, 2=Get (significantly) worse; 3=Remain unchanged; 4,5=Improve (significantly): Positive > 3.9, Neutral = 2.5 to 3.9, Negative < 2.5.
Bases: Austria: Total n= 1,000, Positive n= 183, Neutral n= 718, Negative n= 99; **Europe:** Total n= 11,011, Positive n= 2,344, Neutral n= 7,574, Negative n= 1,093. **Source:** Statista Q 2023.

REGION I

Willingness to switch to a brand enabling internet and app usage attracts esp. drivers with positive legislative attitude, although still below benchmark

Willingness to switch the brand based on internet and app usage – by attitude towards (legislative) market developments
All respondents in %, top 2 and bottom 2 values shown



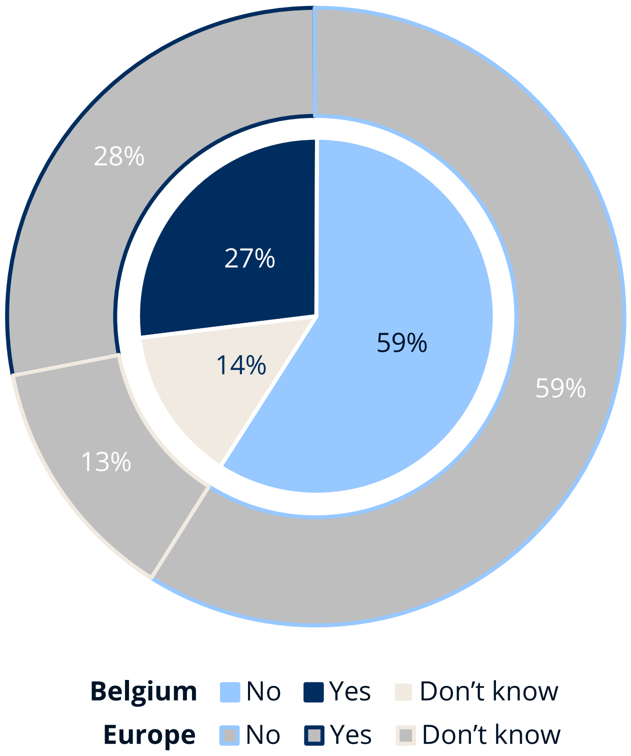
Question Q 31: To what degree would the following options with regards to the use of internet and apps make you consider to switch to another car brand? Another brand that…
Subgroups for attitude towards (legislative) market developments are calculated based on the average of Q39 (1, 2=Get (significantly) worse; 3=Remain unchanged; 4,5=Improve (significantly): Positive > 3.9, Neutral = 2.5 to 3.9, Negative < 2.5.
Bases: Belgium: Total n= 1,000, Positive n= 183, Neutral n= 718, Negative n= 99; **Europe:** Total n= 11,011, Positive n= 2,344, Neutral n= 7,574, Negative n= 1,093. **Source:** Statista Q 2023.

REGION I

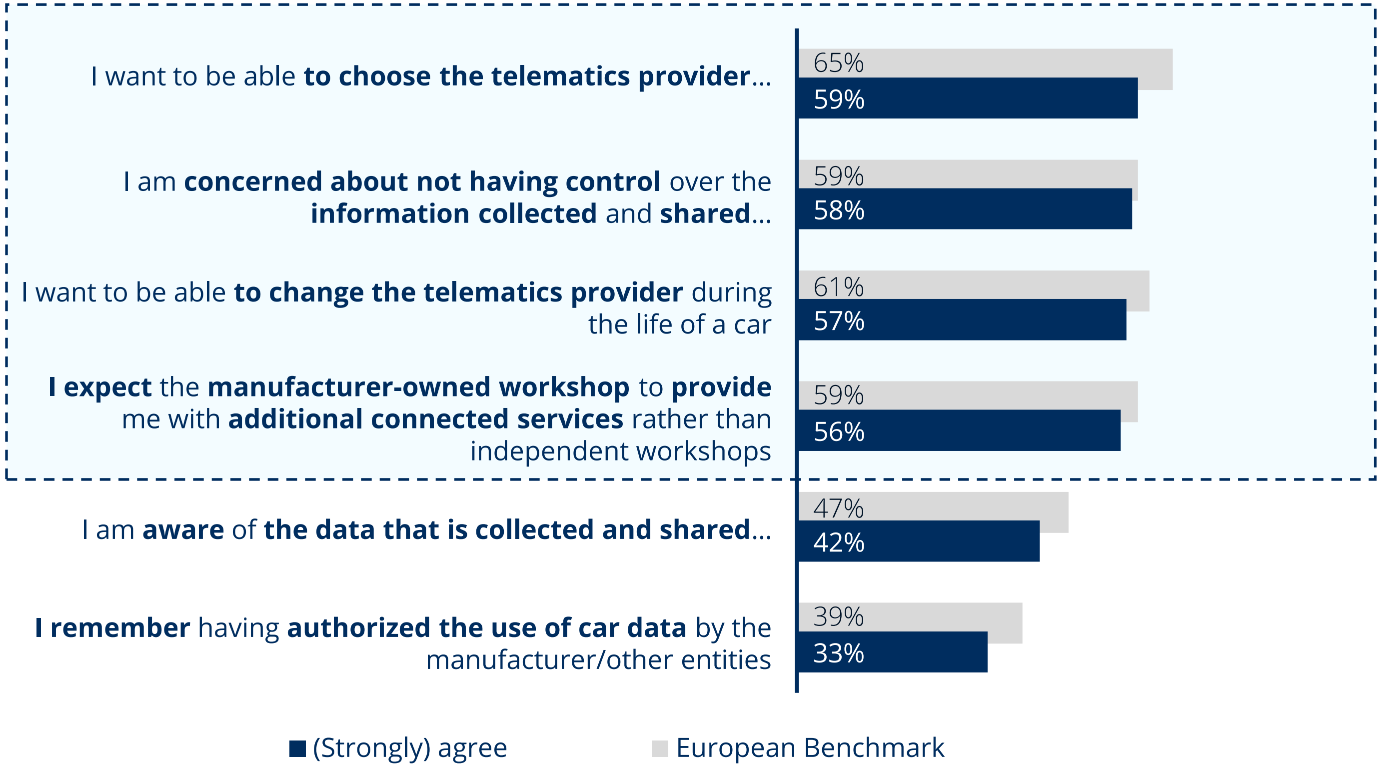
1 in 4 Belgians drives a connected car – Data concerns are pronounced; thus, control and flexibility are crucial and expected from the manufacturer

'Connected car' and telematics
All respondents in % top 2 values for Q35 shown

Is your car „connected"?



How far do you agree with the following statements?

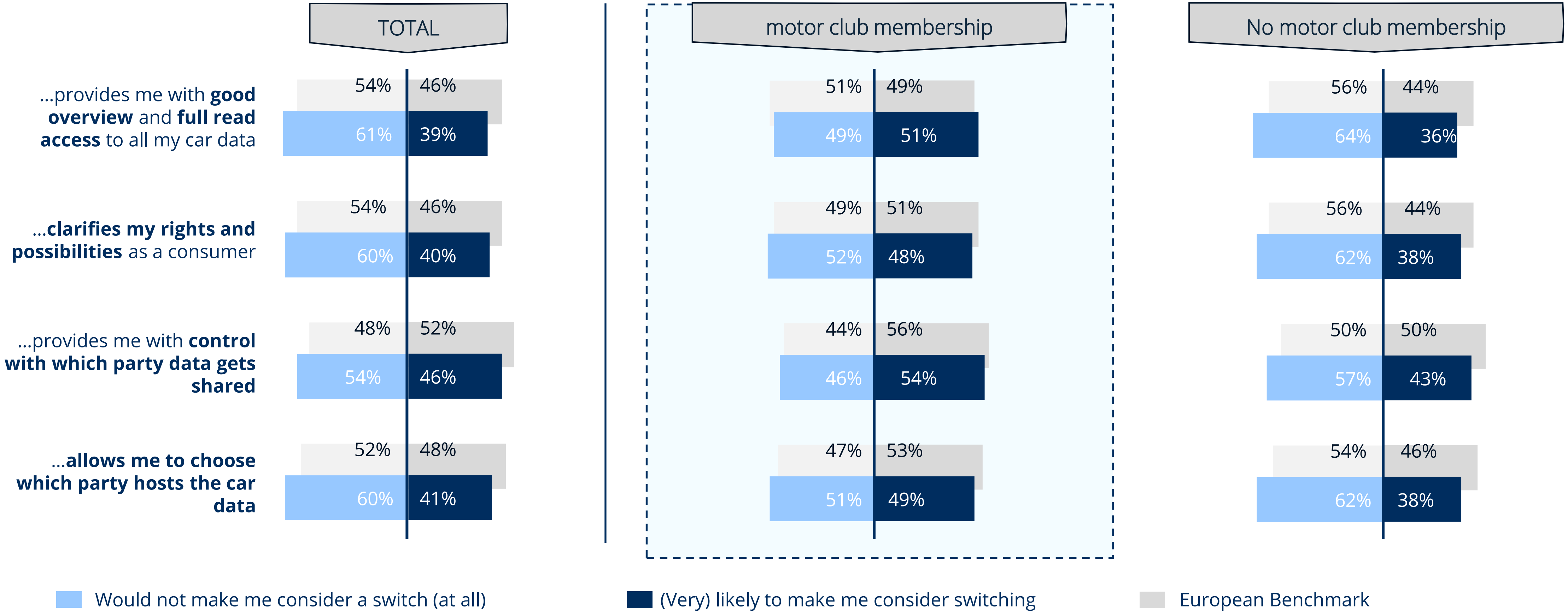


Question Q 34: Is your car "connected" (i.e. uses telematics)?; **Question Q 35:** How far do you agree with the following statements?
Bases: Belgium: Total n= 1,000; **Europe:** Total n= 11,011. **Source:** Statista Q 2023.

FIA REGION I

Belgians are less likely to switch car brands based on data sharing than other Europeans; motor club members show higher interest

Willingness to switch the brand based on data sharing options – by motor club membership
All respondents in %, top 2 and bottom 2 values shown

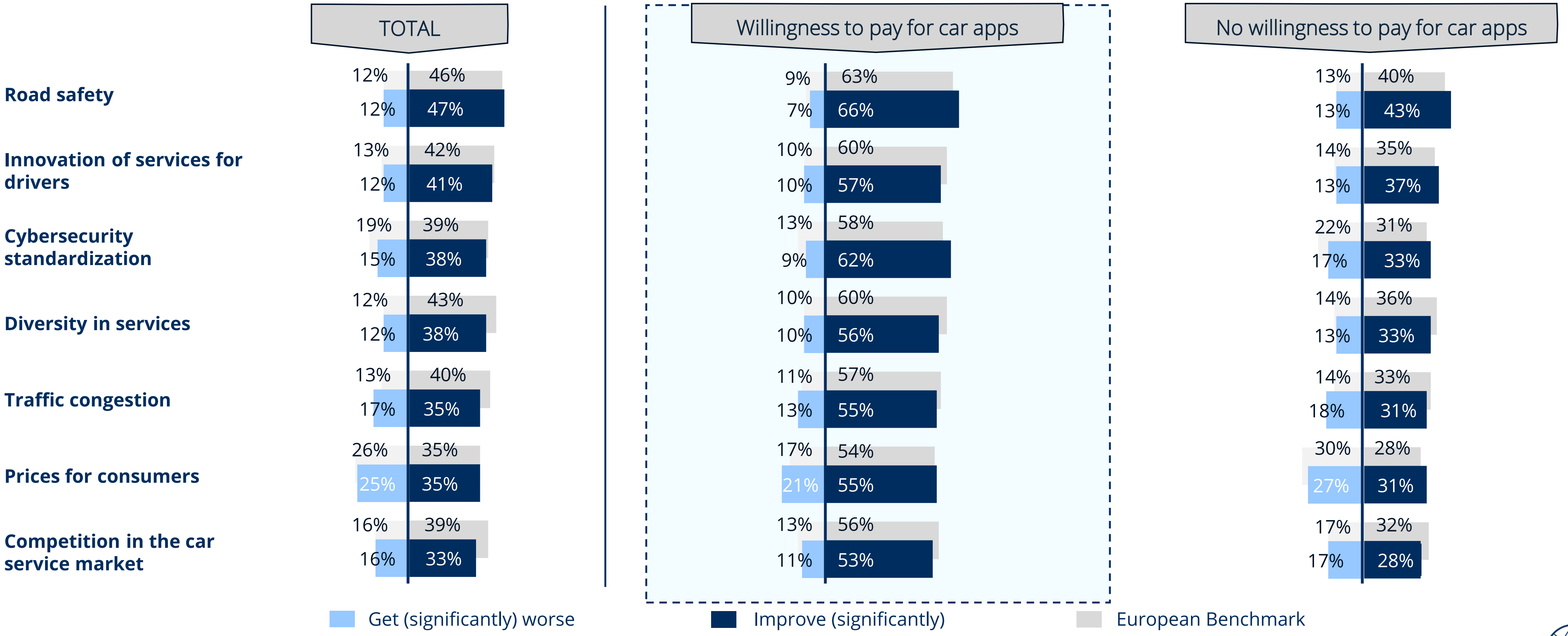


Question Q 38: To what degree would the following options with regards to usage of the car's data make you consider a switch to another car brand? Another brand that…
Bases: Belgium: Total n= 1,000, motor club membership yes / no n= 227 / 773; **Europe:** Total n= 11,011, motor club membership yes / no n= 3,037 / 7,974. **Source:** Statista Q 2023.

FIA REGION I

Road safety, innovation, cybersecurity and diversity in service are expected to improve through legislation – those willing to pay for apps are even more optimistic

Expectations about legislative regulation impact – by willingness to pay for car apps
All respondents in %, top 2 and bottom 2 values shown



Question Q 39: There is a debate whether legislation should, as it did in banking, impose car manufacturers to grant qualified third parties automated data access when a car owner authorizes this. What results would you expect from such regulations?
Bases: Belgium: Total n= 1,000, Willingness to pay for car apps yes / no n= 194 / 806; **Europe:** Total n= 11,011, Willingness to pay for car apps yes / no n= 3,179 / 7,832. **Source:** Statista Q 2023.

REGION I

Country Deep Dive

France

France Management Summary

FRENCH DRIVERS ARE LOYAL TO THEIR LOCAL GARAGES – BUT THEY ARE VERY WILLING TO SWITCH IF THE PRICE IS RIGHT

- In France, there is an equal share of drivers preferring independent and manufacturer **SMR networks.** Independent workshops are perceived to **be equally competent** and **cheaper,** but **drivers generally stay loyal to their local workshop.** Despite French drivers being especially loyal, **price sensitivity** is the most important **driver for a potential switch,** both for drivers currently using manufacturer and independent networks.
- That being said, compared to the European average, **French drivers are especially open to switching from manufacturers to independent networks** if they offer competitive pricing. Willingness to change to independent workshops for better pricing is nearly as high as those willing to change to the manufacturer for the same reason (68% would consider going to independent, 76% to manufacturer).

FRENCH DRIVERS ARE OFTEN CONNECTED: CLEAR LINES BETWEEN THOSE READY TO EXCHANGE DATA FOR APPS AND THOSE WILLING TO PAY

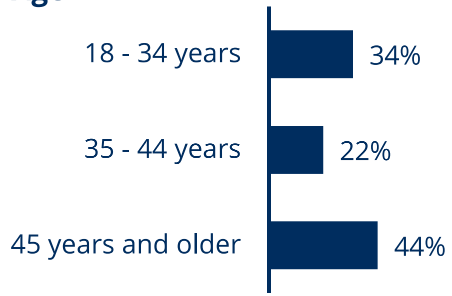
- Only one in four French drivers considers payment for a dedicated car app. A **free-of-charge app** is the **most popular** service model, especially if it is in exchange for vehicle data. **One in three is still undecided** on the matter.
- **Connected features** such as in-vehicle internet, app integration, or remote control only tempt slightly less than half of the French drivers to consider **switching car brands** (45%-46%). Still, this is slightly above European average.
- One-third of drivers in France already drive a connected car, ranking them above European average. French drivers are as cautious about **data control** despite the high usage rates as the Benchmark. Especially those willing to pay for car apps are also willing to **switch brands for control over their data.**
- **Legislative regulations** are expected to have a **positive impact** on the market in all forms, from safety to prices and even traffic regulation.

Low motor club membership rate in France – Vast majority is neutral to positive towards the impact of regulations on the vehicle market

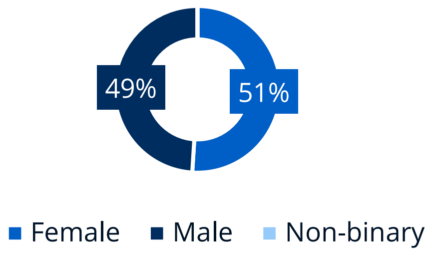
Country Characteristics France

SOCIODEMOGRAPHICS & MEMBERSHIP

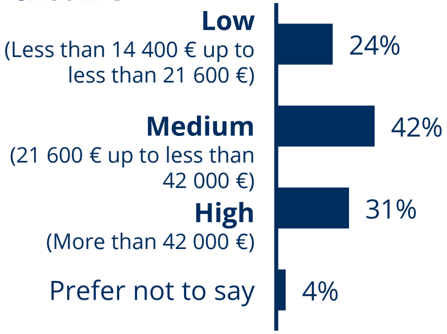
Age



Gender



Income



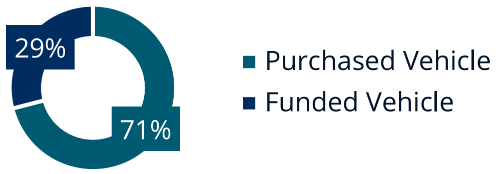
Motor club Membership

9% Yes

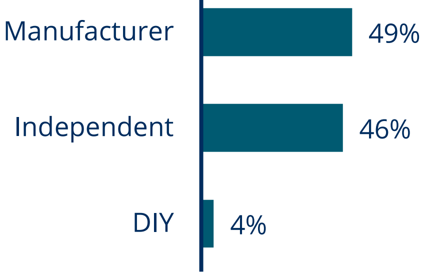
No **91%**

VEHICLE & ATTITUDE

Vehicle Ownership



SMR Preference



Vehicle Age

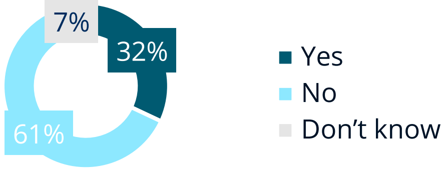
6 years (Median)

Willingness to Pay for Car Apps

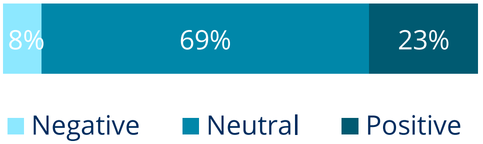
25% Yes

No **75%**

Connected Car



Attitude towards (Legislative) Market Development

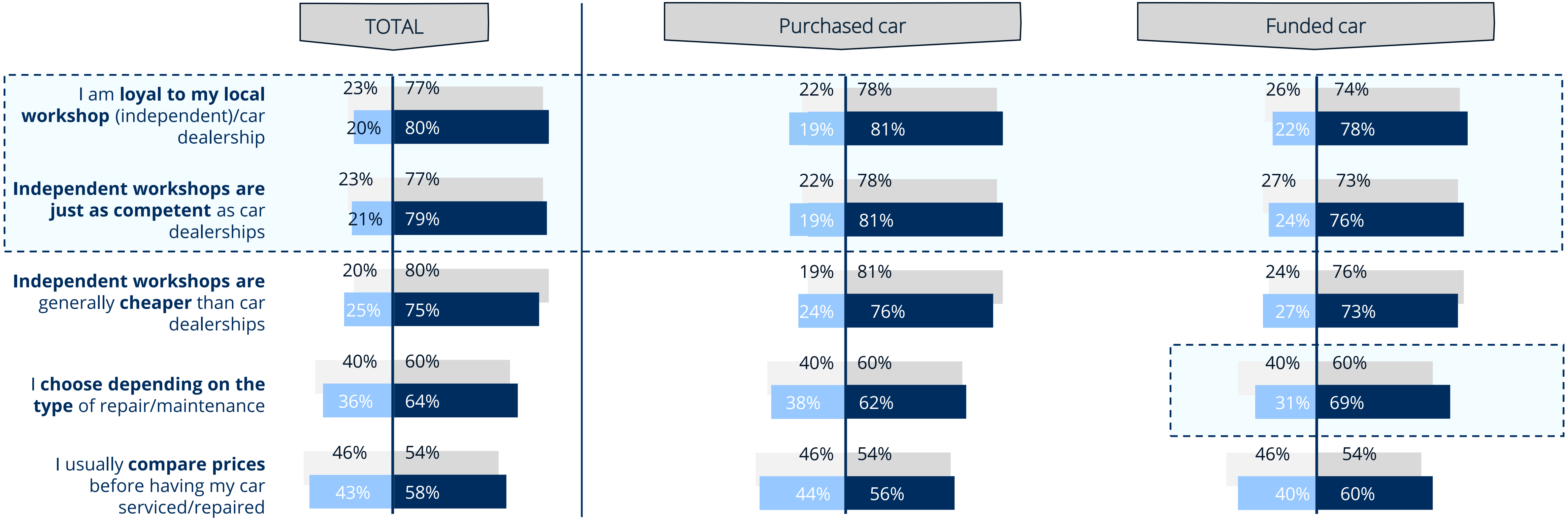


Question Q 1: What is your gender?, **Q 2:** How old are you?, **Q 10:** How old is your car?, **Q 40:** About how high is the annual gross income that your household has at its disposal, before tax and contributions?, **Q 43:** Are you currently member of motorist club?, **Q 11:** How did you acquire your car?, **Q 15:** What is your strategy of selecting a service/workshop for your car when needing regular maintenance?, **Q 28:** Would you consider paying for dedicated apps offered […]?, **Q 34:** Is your car connected?, **Q 39:** There is a debate whether legislation should, […]. What results would you expect from such regulations?
Bases: France: Total n= 1,000. **Source:** Statista Q 2023.

REGION I

French drivers perceive independent WSs as competent and tend to be loyal – Drivers of funded cars are more likely to choose WSs depending on services

Top 5 statements about car repair/maintenance – by vehicle ownership
All respondents in %, top 2 and bottom 2 values shown



Statement	TOTAL (Strongly) disagree	TOTAL (Strongly) agree	TOTAL European Benchmark disagree	TOTAL European Benchmark agree	Purchased car (Strongly) disagree	Purchased car (Strongly) agree	Purchased car European Benchmark disagree	Purchased car European Benchmark agree	Funded car (Strongly) disagree	Funded car (Strongly) agree	Funded car European Benchmark disagree	Funded car European Benchmark agree
I am **loyal to my local workshop** (independent)/car dealership	20%	80%	23%	77%	19%	81%	22%	78%	22%	78%	26%	74%
Independent workshops are just as competent as car dealerships	21%	79%	23%	77%	19%	81%	22%	78%	24%	76%	27%	73%
Independent workshops are generally **cheaper** than car dealerships	25%	75%	20%	80%	24%	76%	19%	81%	27%	73%	24%	76%
I **choose depending on the type** of repair/maintenance	36%	64%	40%	60%	38%	62%	40%	60%	31%	69%	40%	60%
I usually **compare prices** before having my car serviced/repaired	43%	58%	46%	54%	44%	56%	46%	54%	40%	60%	46%	54%

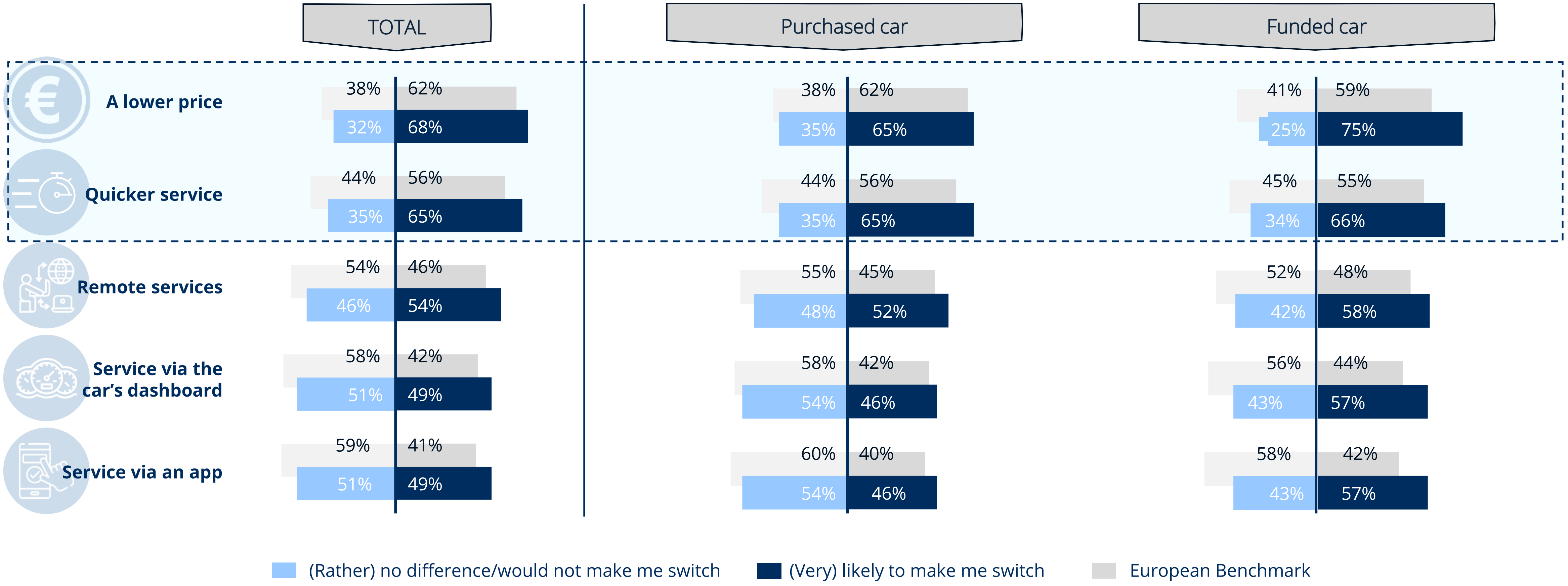
(Strongly) disagree | (Strongly) agree | European Benchmark

Question Q 19: For car repair/maintenance, to what extent would you agree with each of the following statements?
Bases: France: Total n= 1,000, Purchased car n= 709, Funded car n= 291; **Europe:** Total n= 11,011, Purchased car n= 8,590, Funded car n= 2,421. **Source:** Statista Q 2023.

REGION I

Above European benchmark: two-thirds of French drivers are likely to switch to independent WSs if they offer lower pricing and quicker services

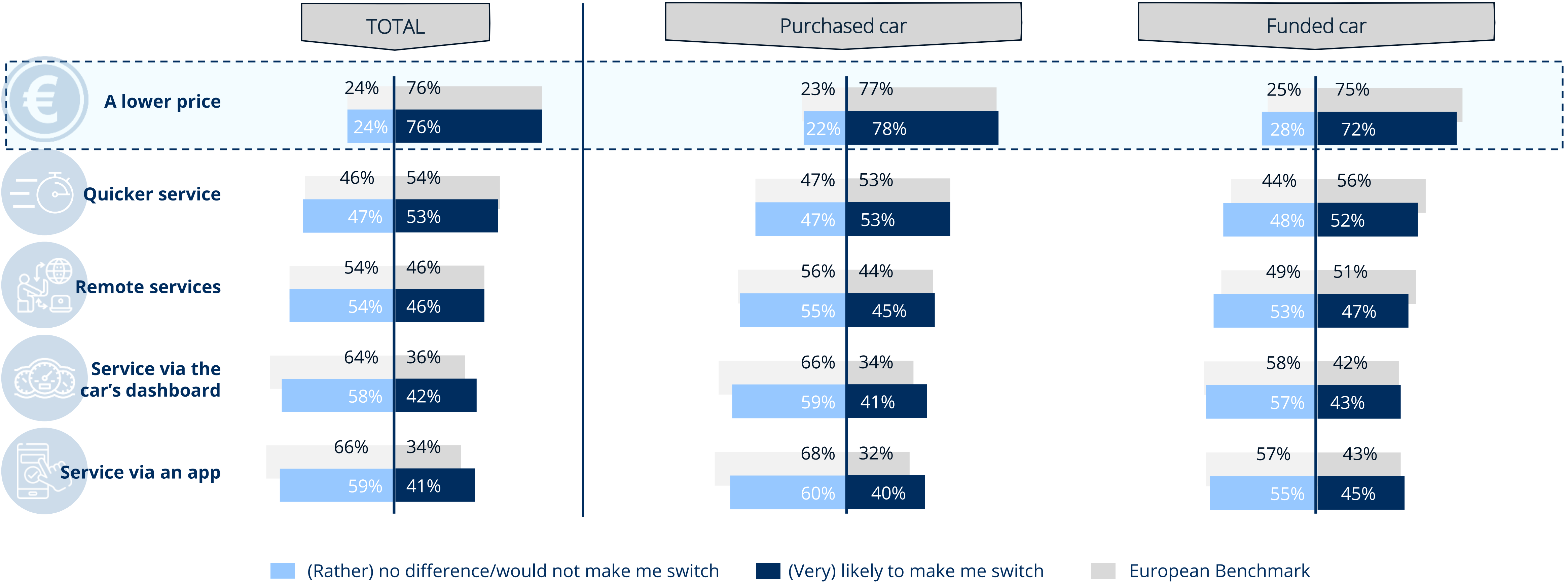
Arguments for switching workshop type: **manufacturer to independent** – by vehicle ownership
Respondents who prefer manufacturer networks/workshops in %, top 2 and bottom 2 values shown



Question Q 20.1: How likely are you to switch to an independent workshop in the following situations? If the independent workshop...
Bases: France: Total n= 488, Purchased car n= 333, Funded car n= 155 ; **Europe:** Total n= 4,575, Purchased car n= 3,394, Funded car n= 1,181. **Source:** Statista Q 2023.

Pronounced price sensitivity: Independent WS preferers are likely to switch for lower costs – Remote and digital services are generally more attractive

Arguments for switching workshop type: **independent to manufacturer** – by vehicle ownership
Respondents who prefer independent networks/workshops in %, top 2 and bottom 2 values shown



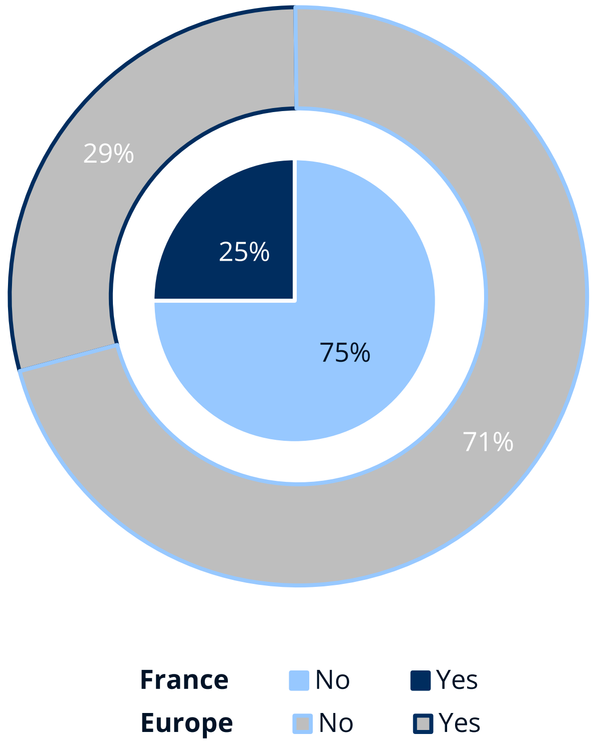
Question Q 20.2: How likely are you to switch to a manufacturer workshop in the following situations? If the manufacturer workshop….
Bases: France: Total n= 457, Purchased car n= 329, Funded car n= 128; **Europe:** Total n= 5,776, Purchased car n= 4,642, Funded car n= 1,134. **Source:** Statista Q 2023.

REGION I

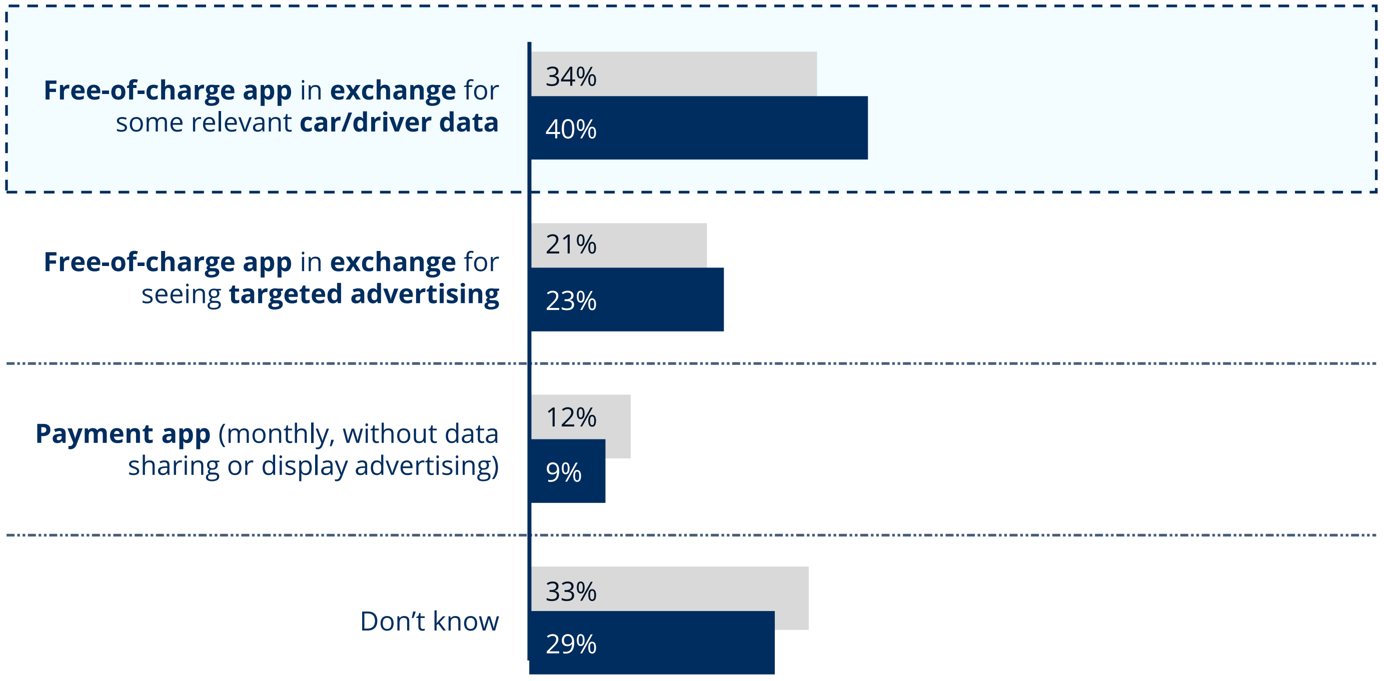
Paying for car apps is considered less often than the European benchmark – Free-of-charge apps in exchange for data attract 2 in 5 French drivers

Considering paying for dedicated car apps and preferred service model
All respondents in %

Considering paying for car apps



Preferred car app service model

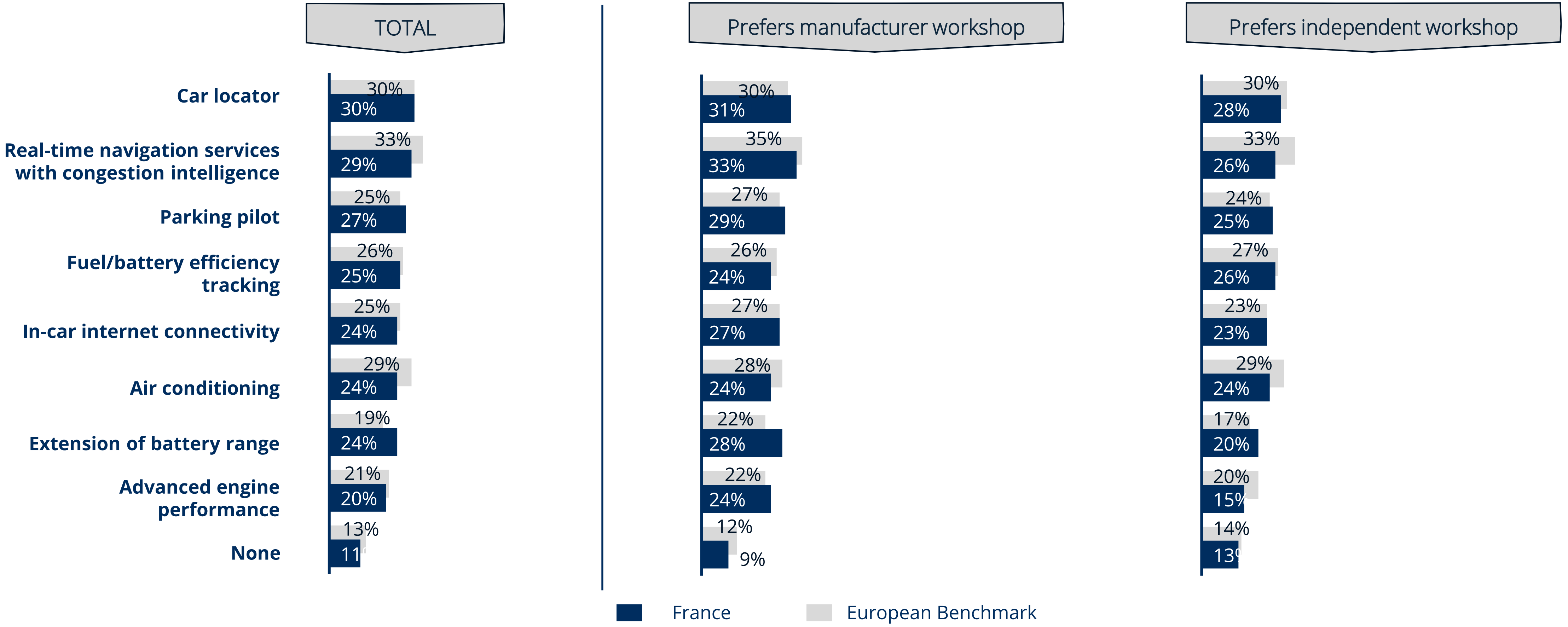


Question Q 28: Would you consider paying for dedicated apps offered exclusively for the cars display/screen?; **Question Q 29:** Dedicated car apps can be offered in various ways: Which of the following service models do you prefer?
Bases: France: Total n= 1,000; **Europe:** Total n= 11,011. **Source:** Statista Q 2023.

FIA REGION I

As in other European countries, locator, navigation, and parking pilot are favored – Manufacturer preferers are slightly more interested in connected features

Services in a 'connected car' respondents are willing to pay for – by SMR workshop preference (DIY not displayed)
All respondents in %

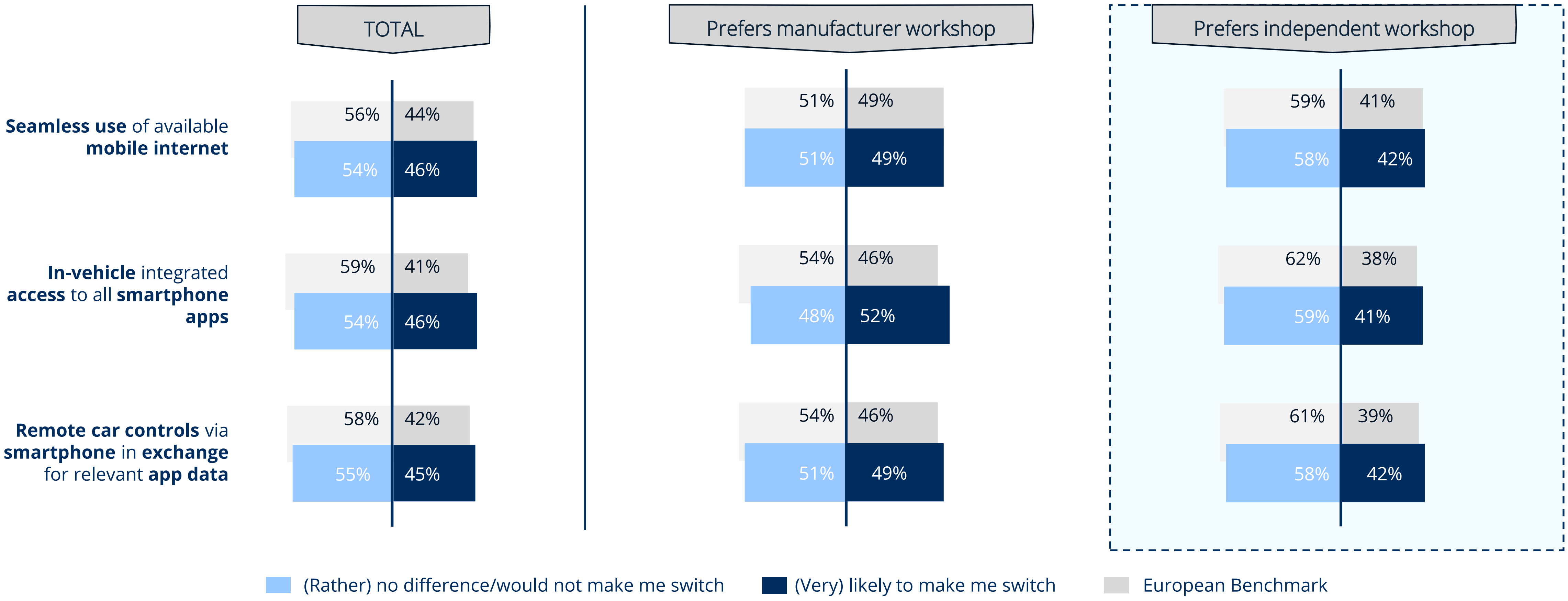


Question Q 32: For which of the following services in a 'connected car', would you generally be willing to pay a monthly amount?
Bases: France: Total n= 1,000, Prefers manufacturer workshop n= 488, Prefers independent workshop n= 457; **Europe:** Total n= 11,011, Prefers manufacturer workshop n= 4,575, Prefers independent workshop n= 5,776.
Source: Statista Q 2023.

REGION I

Switching to a brand that enables internet and app usage is not convincing for all French drivers – Especially independent WS visitors are reluctant

Willingness to switch the brand based on internet and app usage – by SMR workshop preference (DIY not displayed)
All respondents in %, top 2 and bottom 2 values shown

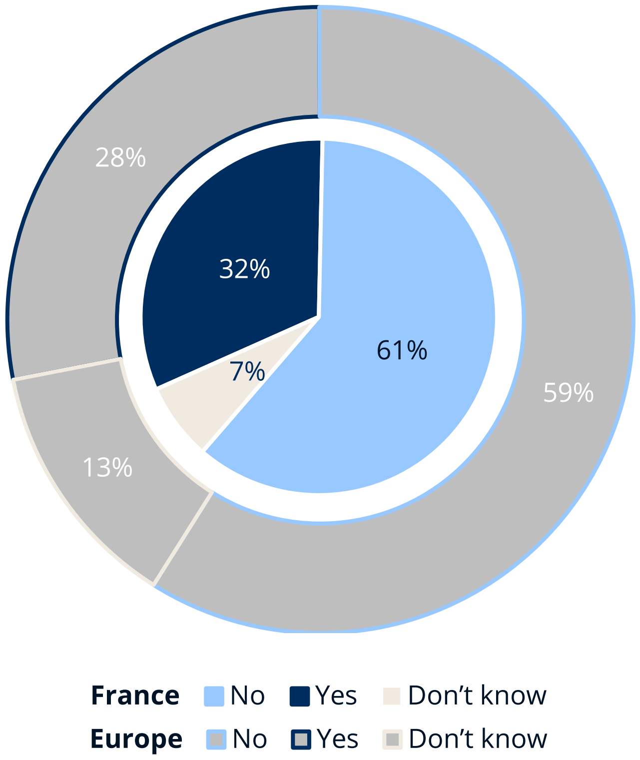


Question Q 31: To what degree would the following options with regards to the use of internet and apps make you consider to switch to another car brand? Another brand that…
Bases: France: Total n= 1,000, Prefers manufacturer workshop n= 488, Prefers independent workshop n= 457; **Europe:** Total n= 11,011, Prefers manufacturer workshop n= 4,575, Prefers independent workshop n= 5,776.
Source: Statista Q 2023.

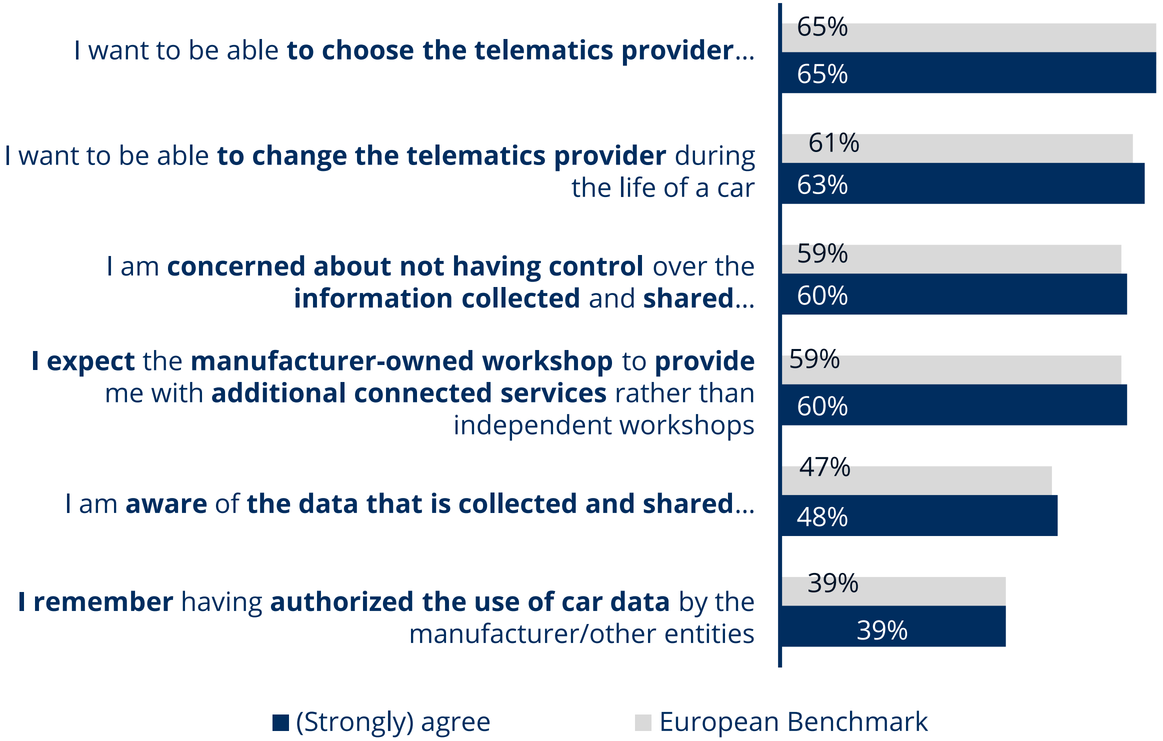
Connected cars are more prevalent in France – provider selection and flexibility (mostly expected from manufacturers) are key to addressing data concerns

'Connected car' and telematics
All respondents in % top 2 values for Q35 shown

Is your car „connected"?



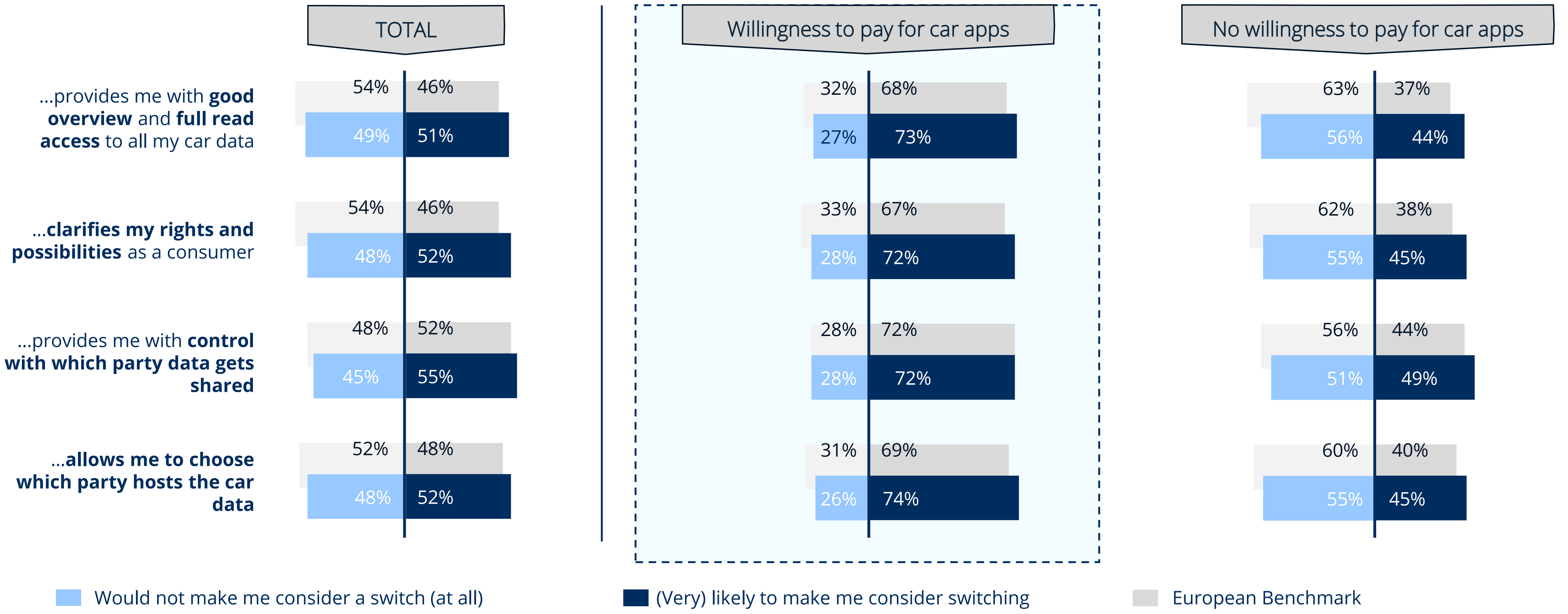
How far do you agree with the following statements?



Question Q 34: Is your car "connected" (i.e. uses telematics)?; **Question Q 35:** How far do you agree with the following statements?
Bases: France: Total n= 1,000; **Europe:** Total n= 11,011. **Source:** Statista Q 2023.

In France, the willingness to pay for car apps translates into a pronounced brand switching tendency

Willingness to switch the brand based on data sharing options – by willingness to pay for car apps
All respondents in %, top 2 and bottom 2 values shown



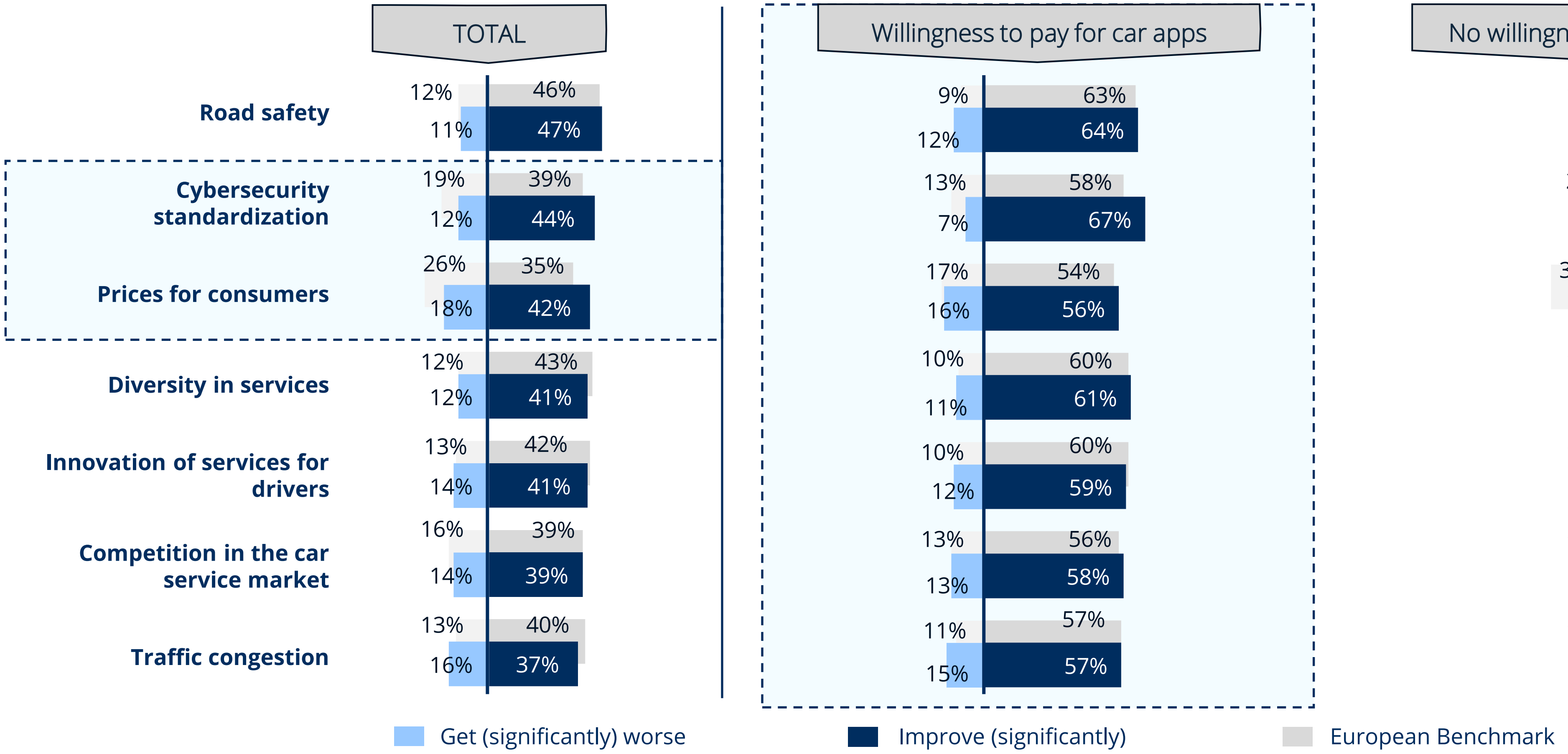
Question Q 38: To what degree would the following options with regards to usage of the car's data make you consider a switch to another car brand? Another brand that...
Bases: France: Total n= 1,000, Willingness to pay for car apps yes / no n= 246 / 754; **Europe:** Total n= 11,011, Willingness to pay for car apps yes / no n= 3,179 / 7,832. **Source:** Statista Q 2023.

REGION I

French drivers willing to pay for car apps are more positive about the impact of legislative regulations, esp. regarding cybersecurity and prices

Expectations about legislative regulation impact – by willingness to pay for car apps

All respondents in %, top 2 and bottom 2 values shown



Question Q 39: There is a debate whether legislation should, as it did in banking, impose car manufacturers to grant qualified third parties automated data access when a car owner authorizes this. What results would you expect from such regulations?

Bases: France: Total n= 1,000, Willingness to pay for car apps yes / no n= 246 / 754; **Europe:** Total n= 11,011, Willingness to pay for car apps yes / no n= 3,179 / 7,832. **Source:** Statista Q 2023

REGION I


Country Deep Dive
Netherlands

Netherlands Management Summary

DUTCH DRIVERS ARE LOYAL TO THEIR LOCAL WORKSHOPS – HOWEVER, INDEPENDENT NETWORKS MUST KEEP PRICING COMPETITIVE TO KEEP THEIR CUSTOMER BASE

- Generally, there is a slight preference towards **independent workshop networks** compared to **manufacturer ones in the Netherlands.** Consequently, a vast majority of Dutch drivers rate **independent workshops** to **be equally competent** while being **cheaper**. Still, **loyalty towards their local shop** is the most important factor for their garage choice.
- As in the rest of Europe, drivers usually visiting **manufacturer networks** for their SMR **are loyal**: only half of them would switch to independent networks due to lower prices and/or quicker services.
- As all around Europe, **Drivers servicing their car at independent workshops** are **less loyal, at least when it comes to pricing** – ¾ would switch to a manufacturer for a lower price. This goes especially for drivers of connected cars.

NOT "INTO CONNECTED": CONNECTIVITY FEATURES ARE UNLIKELY TO IMPACT BRAND CHOICE & BEHAVIOR

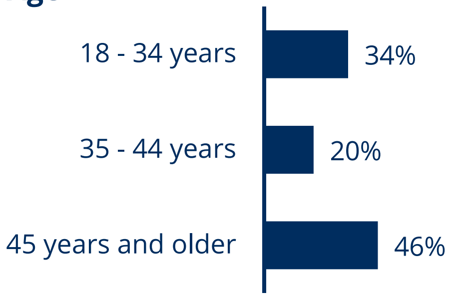
- Only one in four Dutch drivers is open to paying for a dedicated car app. However, **free-of-charge apps** aren't **popular** either: Nearly half of the Dutch drivers are still **undecided on the kind of service model they'd prefer**.
- Consequently, **connected features do not play a big role in the Dutch drivers' brand consideration.** Only slightly more than a third of drivers would be tempted to switch brands to gain access to features such as mobile internet, app integration or remote controls, which is slightly below benchmark.
- While 27% already drive connected cars, the **Dutch are rather unemotional about the different approaches towards the sharing of data:** Only among those that are willing to pay for car apps there is a majority that would consider switching brands to control their own data.
- **Legislation** is especially expected to have a **positive impact on safety and convenience aspects,** but less on pricing.

Most Dutch drivers are motor club members - Funding is rather seldom in the Netherlands

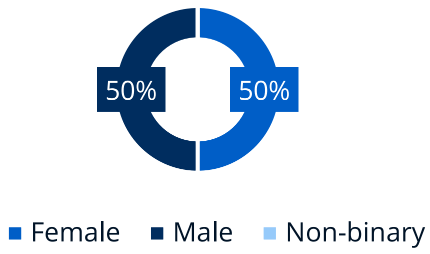
Country Characteristics Netherlands

SOCIODEMOGRAPHICS & MEMBERSHIP

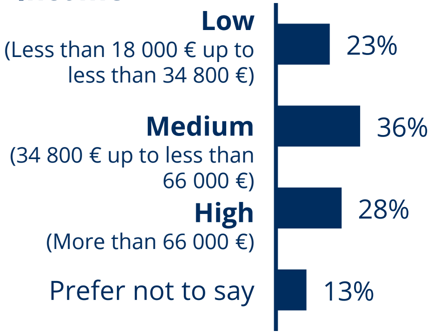
Age



Gender



Income



Motor club Membership

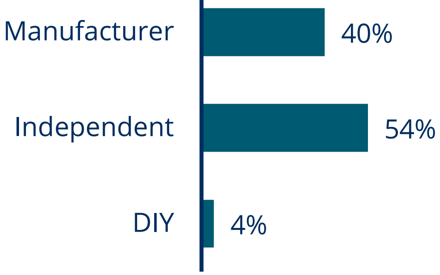
62% Yes

No **38%**

VEHICLE & ATTITUDE

Vehicle Ownership

SMR Preference



Vehicle Age

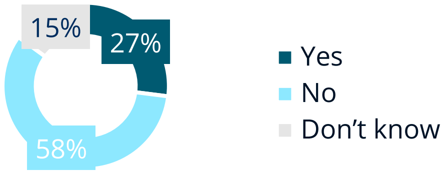
7 years (Median)

Willingness to Pay for Car Apps

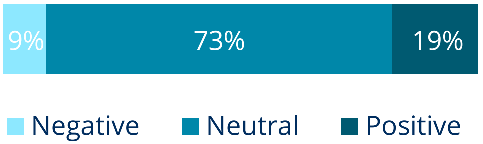
25% Yes

No **75%**

Connected Car



Attitude towards (Legislative) Market Development



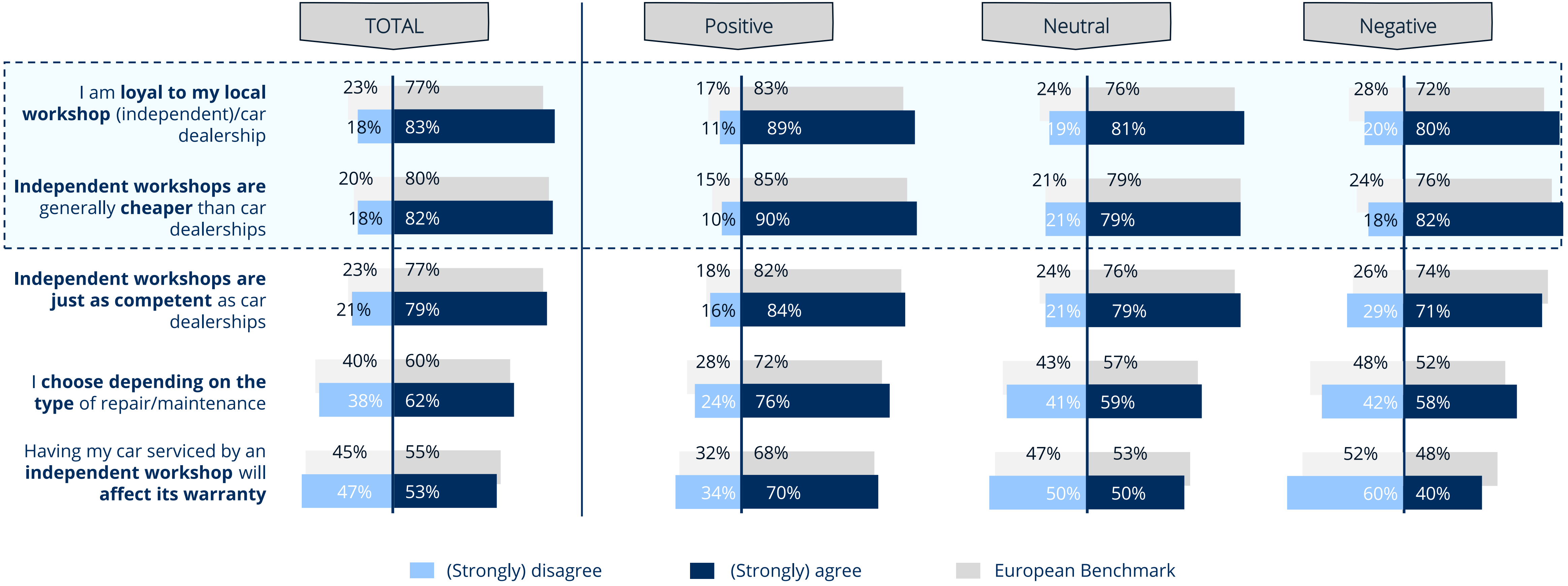
Question Q 1: What is your gender?, **Q 2:** How old are you?, **Q 10:** How old is your car?, **Q 40:** About how high is the annual gross income that your household has at its disposal, before tax and contributions?, **Q 43:** Are you currently member of motorist club?, **Q 11:** How did you acquire your car?, **Q 15:** What is your strategy of selecting a service/workshop for your car when needing regular maintenance?, **Q 28:** Would you consider paying for dedicated apps offered [...]?, **Q 34:** Is your car connected?, **Q 39:** There is a debate wether legislation should, [...]. What results would you expect from such regulations?
Bases: Netherlands: Total n= 1,000. **Source:** Statista Q 2023.

FIA REGION I

SMR Network

Local ties play a highly relevant role for Dutch drivers; Independent WSs are perceived as cheaper – esp. by drivers with positive regulatory attitude

Top 5 statements about car repair/maintenance – by attitude towards (legislative) market developments
All respondents in %, top 2 and bottom 2 values shown

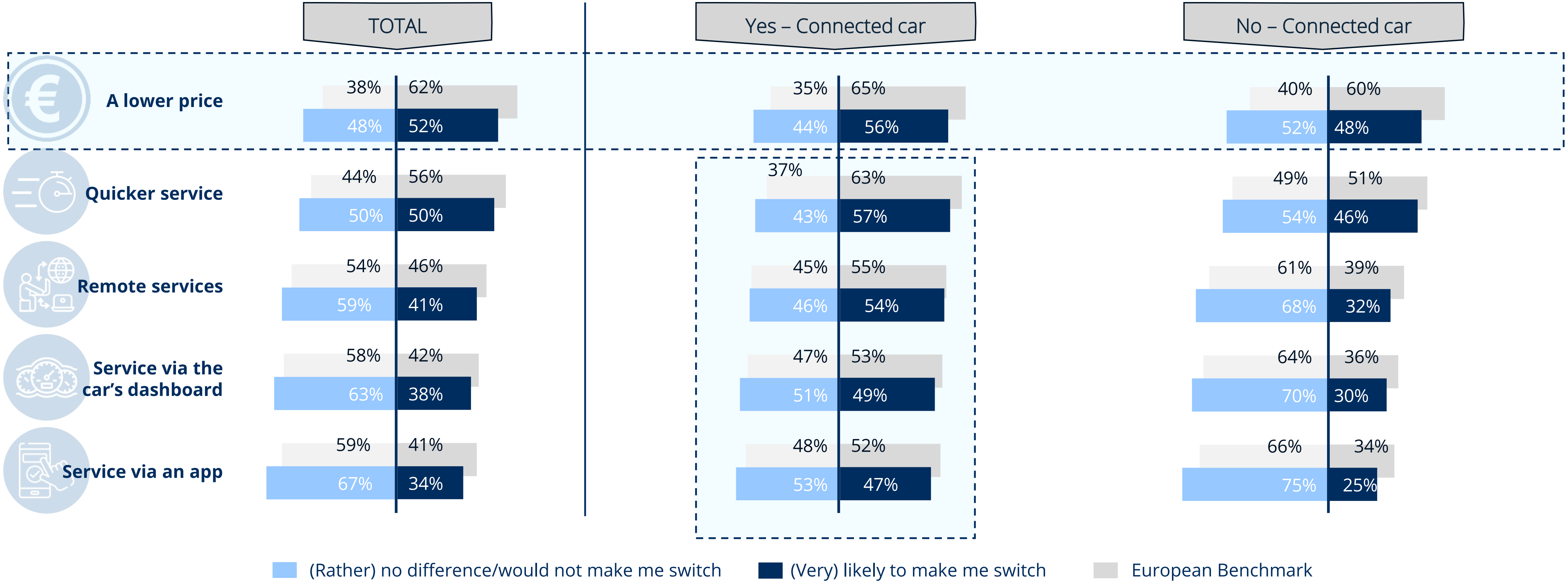


Question Q 19: For car repair/maintenance, to what extent would you agree with each of the following statements?
Subgroups for attitude towards (legislative) market developments are calculated based on the average of Q39 (1, 2=Get (significantly) worse; 3=Remain unchanged; 4,5=Improve (significantly): Positive > 3.9, Neutral = 2.5 to 3.9, Negative < 2.5.
Bases: Netherlands: Total n= 1,000, Positive n= 185, Neutral n= 726, Negative n= 89; **Europe:** Total n= 11,011, Positive n= 2,344, Neutral n= 7,574, Negative n= 1,093. **Source:** Statista Q 2023.

FIA REGION I

Dutch manufacturer visitors are loyal – even price reductions convince only half to switch; Connected car drivers show slightly more interest in switching

Arguments for switching workshop type: **manufacturer to independent** – by car connectivity ('don't know' not displayed)
Respondents who prefer manufacturer networks/workshops in %, top 2 and bottom 2 values shown

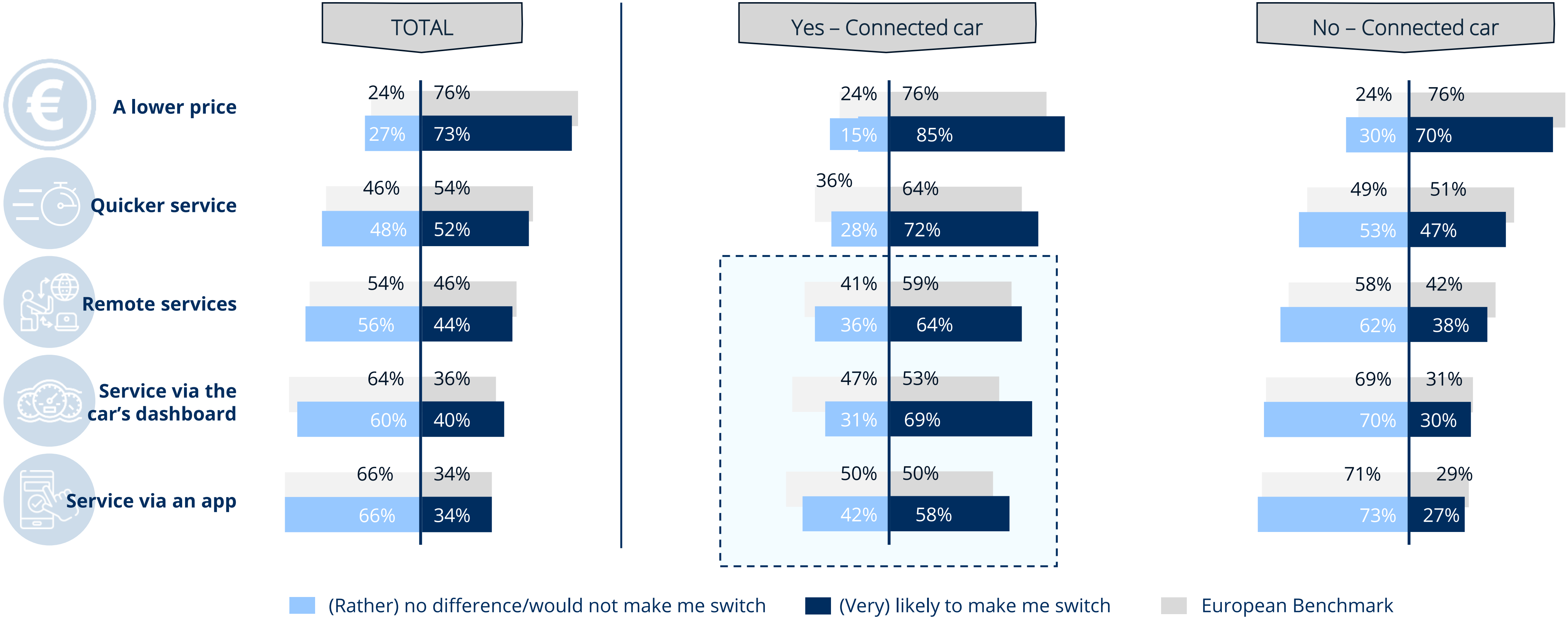


Question Q 20.1: How likely are you to switch to an independent workshop in the following situations? If the independent workshop...
Bases: Netherlands: Total n= 400, Connected Car yes / no n= 147 / 192; **Europe:** Total n= 4,575, Connected car yes / no n= 1,826 / 2,117. **Source:** Statista Q 2023.

REGION I

Lower prices at manufacturer networks would attract independent WS visitors – Remote and digital services convince connected car drivers

Arguments for switching workshop type: **independent to manufacturer** – by car connectivity ('don't know' not displayed)
Respondents who prefer independent networks/workshops in %, top 2 and bottom 2 values shown



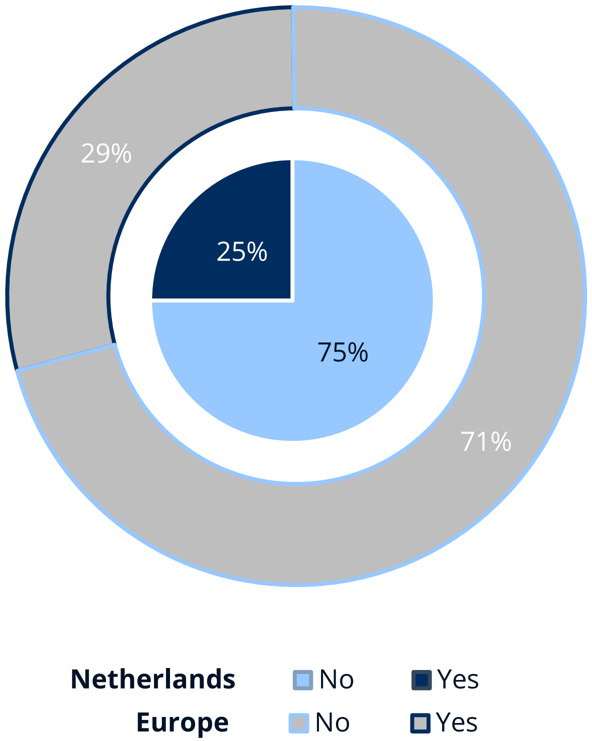
Question Q 20.2: How likely are you to switch to a manufacturer workshop in the following situations? If the manufacturer workshop….
Bases: Netherlands: Total n= 541, Connected Car yes / no n= 107, / 358; **Europe:** Total n= 5,776, Connected car: yes / no n= 1,123 / 3,940. **Source:** Statista Q 2023..

FIA REGION I

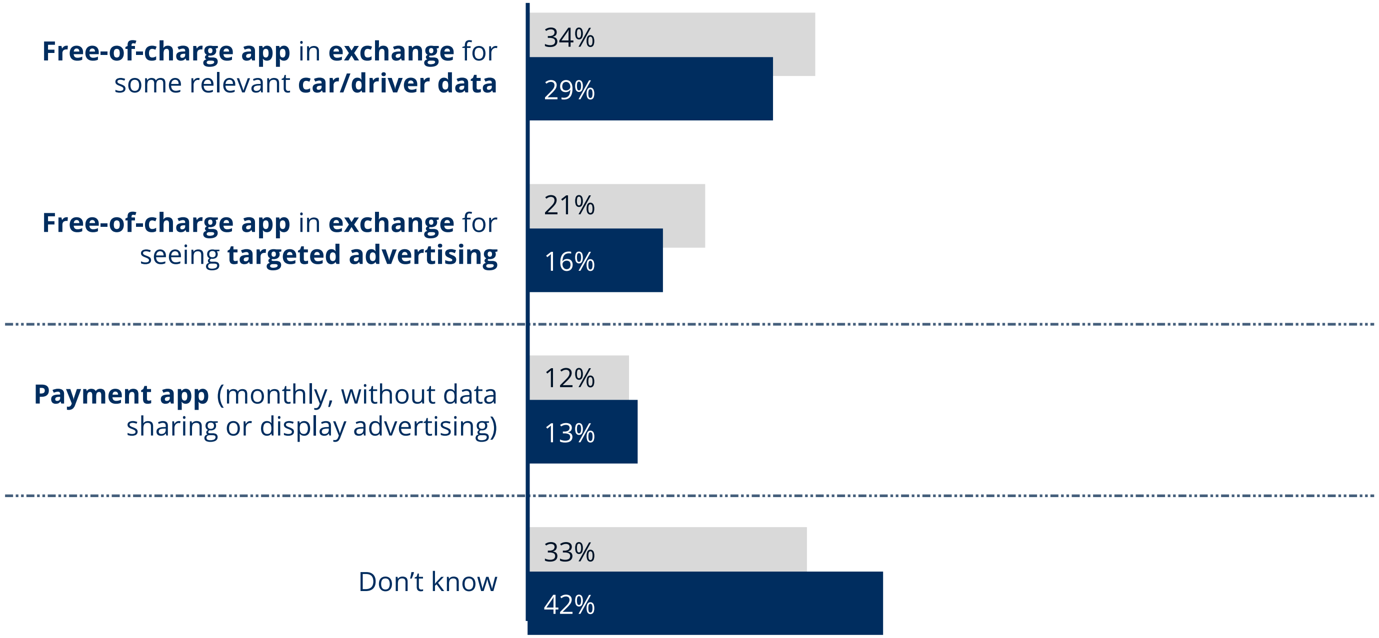
1 in 4 Dutch drivers considers paying for apps – Still, the vast majority is hesitant about a preferred service model

Considering paying for dedicated car apps and preferred service model
All respondents in %

Considering paying for car apps



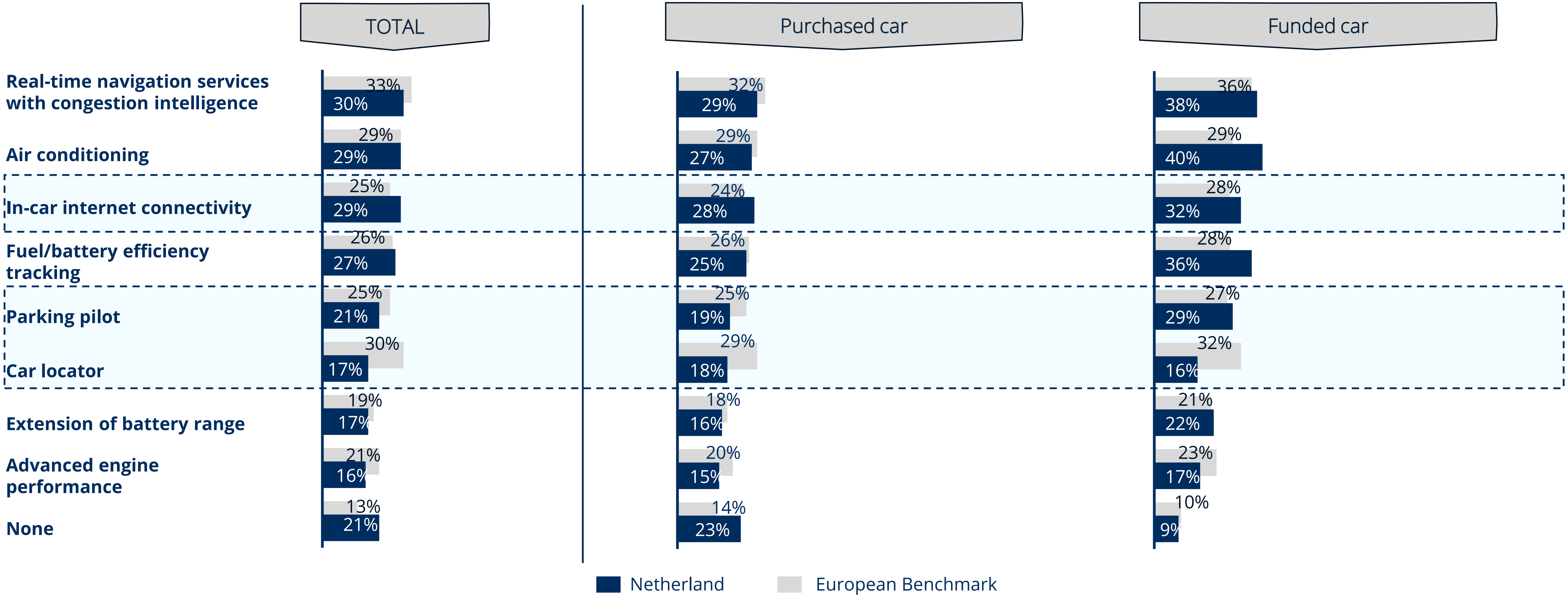
Preferred car app service model



Question Q 28: Would you consider paying for dedicated apps offered exclusively for the cars display/screen?; **Question Q 29:** Dedicated car apps can be offered in various ways: Which of the following service models do you prefer?
Bases: Netherlands: Total n= 1,000; **Europe:** Total n= 11,011. **Source:** Statista Q 2023.

Connectivity is attractive to nearly one-third – slightly more for funded car drivers; Parking pilot and car locator are less interesting for the Dutch

Services in a 'connected car' respondents are willing to pay for – by vehicle ownership
All respondents in %

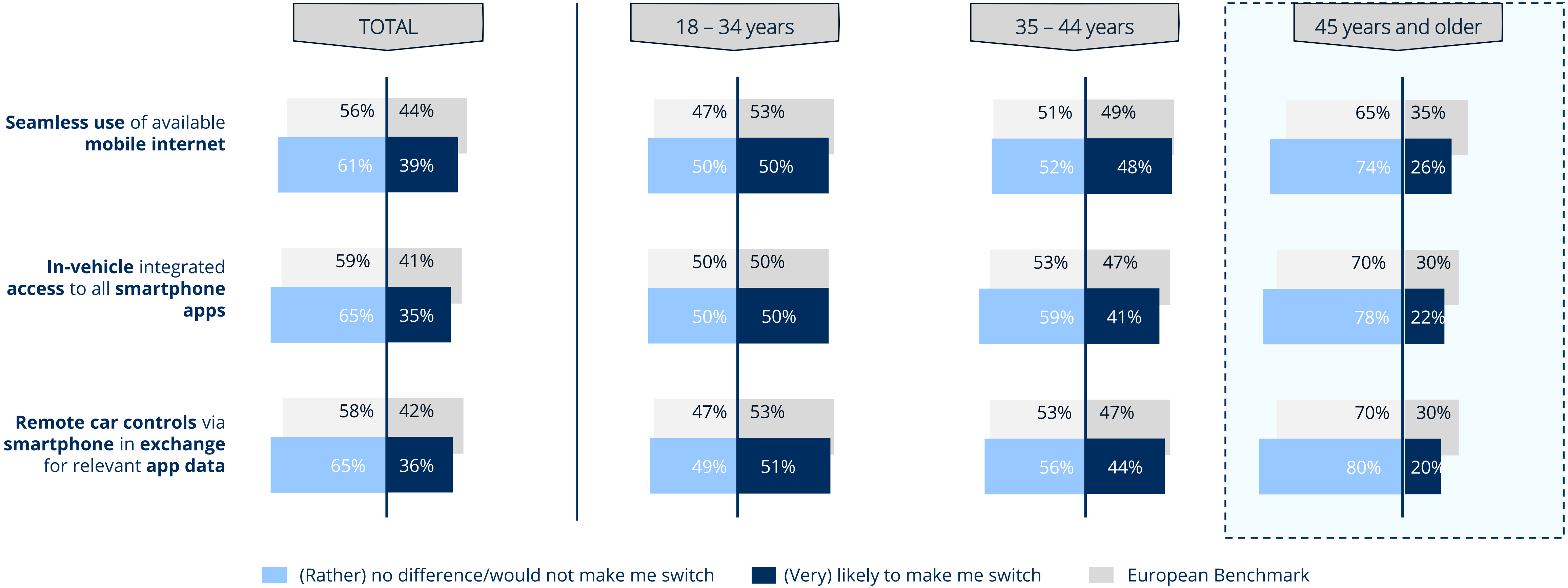


Question Q 32: For which of the following services in a 'connected car', would you generally be willing to pay a monthly amount?
Bases: Netherland: Total n= 1,000, Purchased car n= 848, Funded car n= 152; **Europe:** Total n= 11,011, Purchased car n= 8,590, Funded car n= 2,421. **Source:** Statista Q 2023.

FIA REGION I

Internet and app usage options do not necessarily convince Dutch drivers – Especially those age 45 or older are reluctant

Willingness to switch the brand based on internet and app usage – by age
All respondents in %, top 2 and bottom 2 values shown



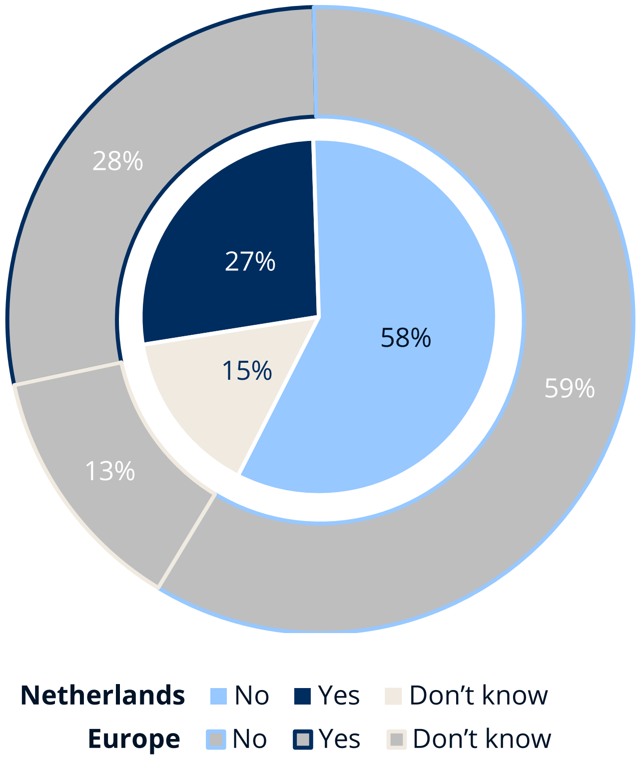
Question Q 31: To what degree would the following options with regards to the use of internet and apps make you consider to switch to another car brand? Another brand that…
Bases: Netherlands: Total n= 1,000, 18-34 years n= 339, 35-44 years n= 203, 45 years and older n= 458 ; **Europe:** Total n= 11,011, 18-34 years n= 3,656, 35-44 years n= 2,542, 45 years and older n= 4,813 . **Source:** Statista Q 2023.

FIA REGION I

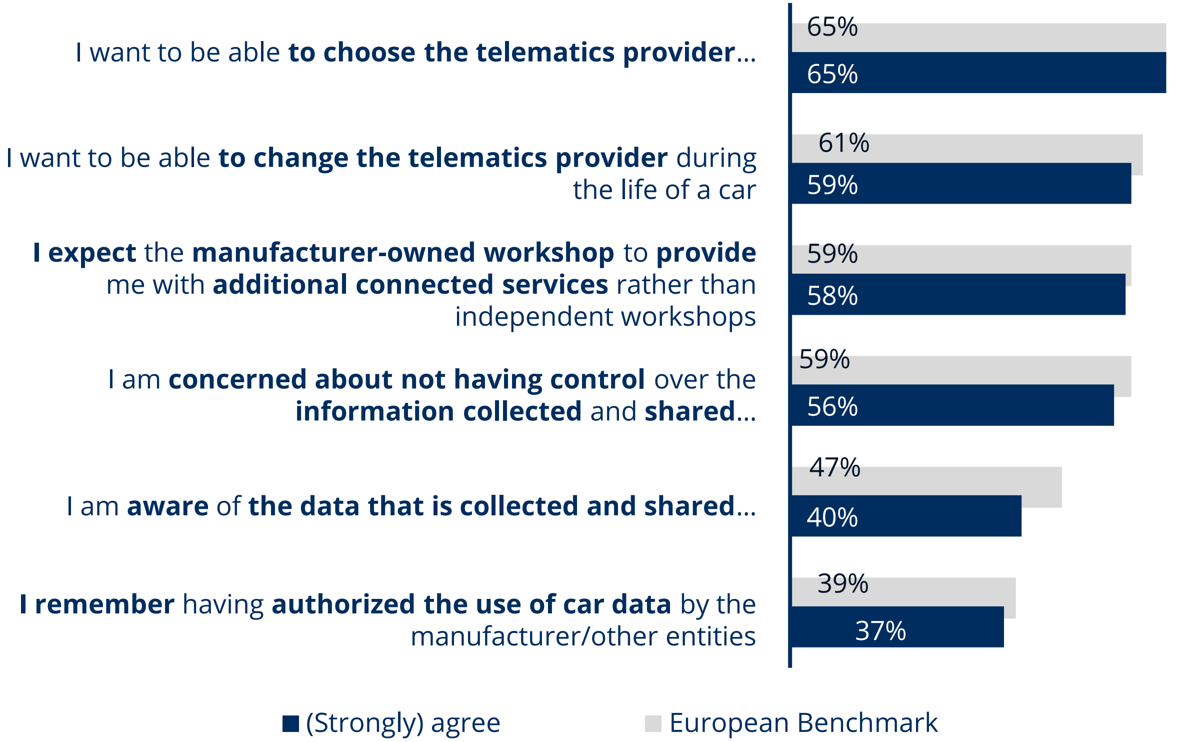
The share of connected cars in the Netherlands is in line with the European average – Possibility to select and change the telematics provider is important

'Connected car' and telematics
All respondents in % top 2 values for Q35 shown

Is your car „connected"?



How far do you agree with the following statements?

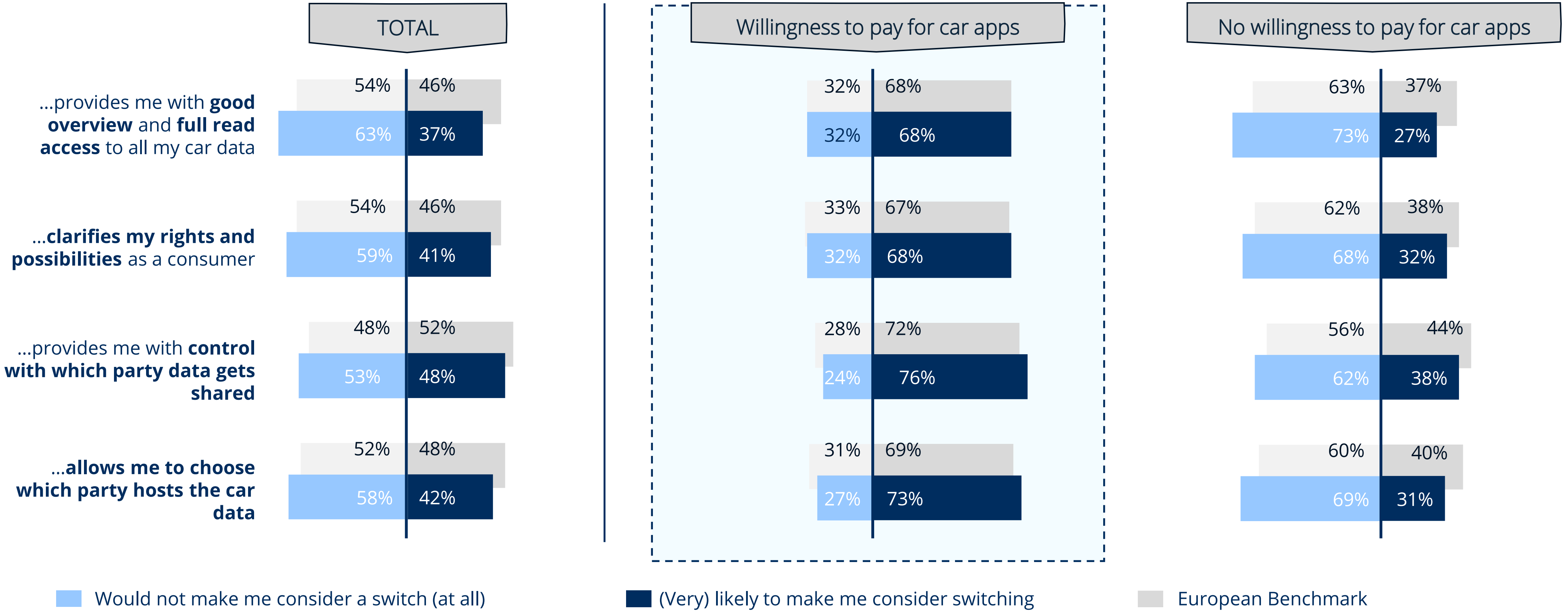


Question Q 34: Is your car "connected" (i.e. uses telematics)?; **Question Q 35:** How far do you agree with the following statements?
Bases: Netherlands: Total n= 1,000; **Europe:** Total n= 11,011. **Source:** Statista Q 2023.

FIA REGION I

Overall, Dutch drivers tend to be cautious about switching to other brands – Those willing to pay for apps have higher demands in terms of data control

Willingness to switch the brand based on data sharing options – by willingness to pay for car apps
All respondents in %, top 2 and bottom 2 values shown

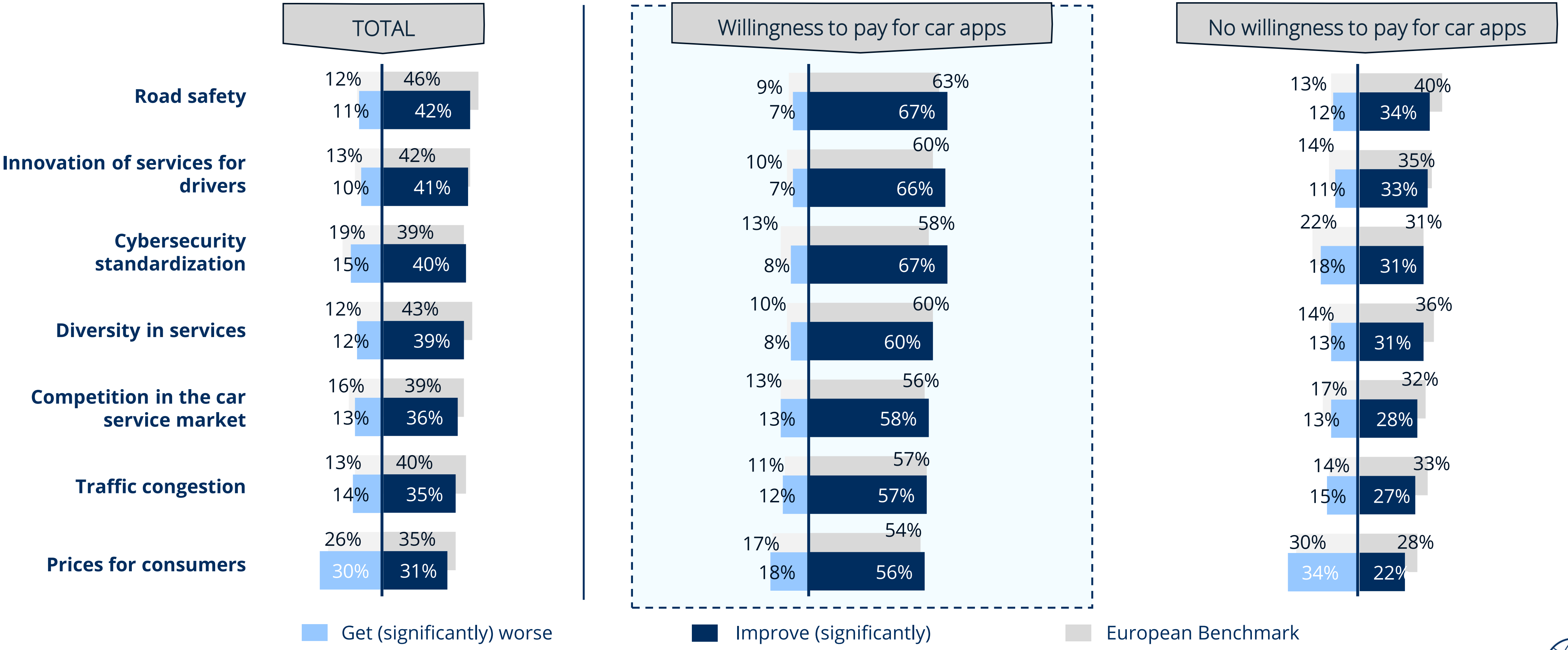


Question Q 38: To what degree would the following options with regards to usage of the car's data make you consider a switch to another car brand? Another brand that…
Bases: Netherlands: Total n= 1,000, Willingness to pay for car apps yes / no n= 253 / 747; **Europe:** Total n= 11,011, Willingness to pay for car apps yes / no n= 3,179 / 7,832. **Source:** Statista Q 2023.

FIA REGION I

Expectations regarding the impact of regulation are close to the European average – Dutch drivers willing to pay for apps expect most improvements

Expectations about legislative regulation impact – by willingness to pay for car apps
All respondents in %, top 2 and bottom 2 values shown



Question Q 39: There is a debate whether legislation should, as it did in banking, impose car manufacturers to grant qualified third parties automated data access when a car owner authorizes this. What results would you expect from such regulations?
Bases: Netherlands: Total n= 1,000, Willingness to pay for car apps yes / no n= 253 / 747; **Europe:** Total n= 11,011, Willingness to pay for car apps yes / no n= 3,179 / 7,832. **Source:** Statista Q 2023

FIA REGION I

Country Deep Dive
Italy

Italy Management Summary

ITALIAN DRIVERS ARE LOYAL TO THEIR LOCAL WORKSHOP, YET WILLING TO SWITCH FOR LOWER PRICES AND FASTER SERVICE

- **Independent workshop networks are slightly preferred** in Italy, as they are perceived to be cheaper while offering the same quality of work.
- **8 in 10 Italian drivers consider themselves loyal** to their local workshop. Despite that, more than half are willing to switch between networks for a lower price and quicker service.
- **Low- and middle-class-income households** are often interested in **switching away from their manufacturer network and independent workshop.** Next to price and service speed, offering **digital services will make a switch more likely:** More than half state that remote services and services via the car's dashboard or an app would make them switch.

CAR CONNECTIVITY ATTRACTS: ITALIANS SHOW HIGH DEMAND FOR SMART SERVICES AND DATA CONTROL

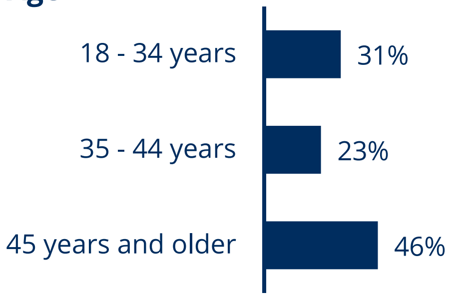
- Italian drivers show a **high willingness to pay for dedicated car apps**. Accordingly, the **purchase interest in individual connected services**, such as a car locator, efficiency tracking, and connectivity, is more **pronounced** – especially among **motor club members**. Nonetheless, when able to choose a service model Italian drivers **prefer free-of-charge apps in exchange for car/driver data.**
- Many Italians are already **familiar with telematics systems**: more than 1 in 3 drivers owns a connected car (highest share across all countries). Choosing and changing the telematics provider is central for connected car owners.
- Consequently, **switching car brands** based on **internet and app usage** is **legit** for at least half of the Italian drivers – switching provider based on **data sharing options is even more relevant**.

1 in 3 Italians drives a car with telematics, and every fifth is a member in a motor club – SMR preference is nearly equally distributed

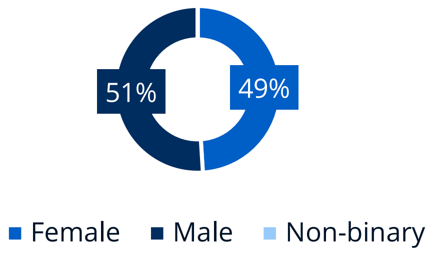
Country Characteristics Italy

SOCIODEMOGRAPHICS & MEMBERSHIP

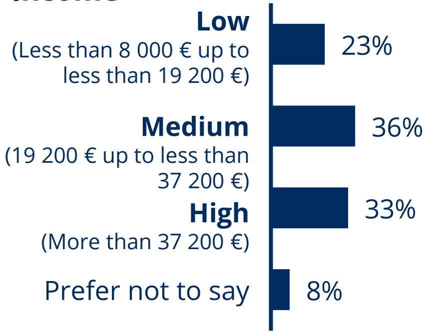
Age



Gender



Income



Motor club Membership

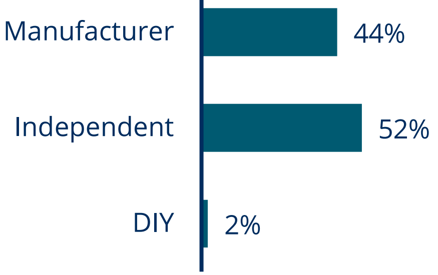
19% Yes

No **81%**

VEHICLE & ATTITUDE

Vehicle Ownership

SMR Preference



Vehicle Age

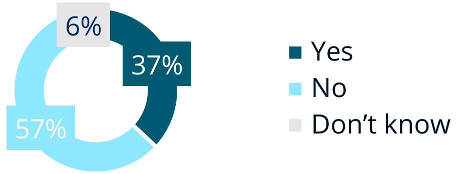
6 years (Median)

Willingness to Pay for Car Apps

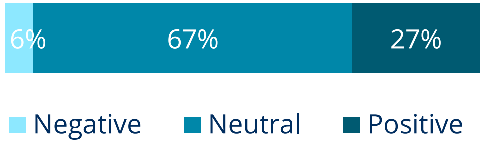
39% Yes

No **61%**

Connected Car



Attitude towards (Legislative) Market Development

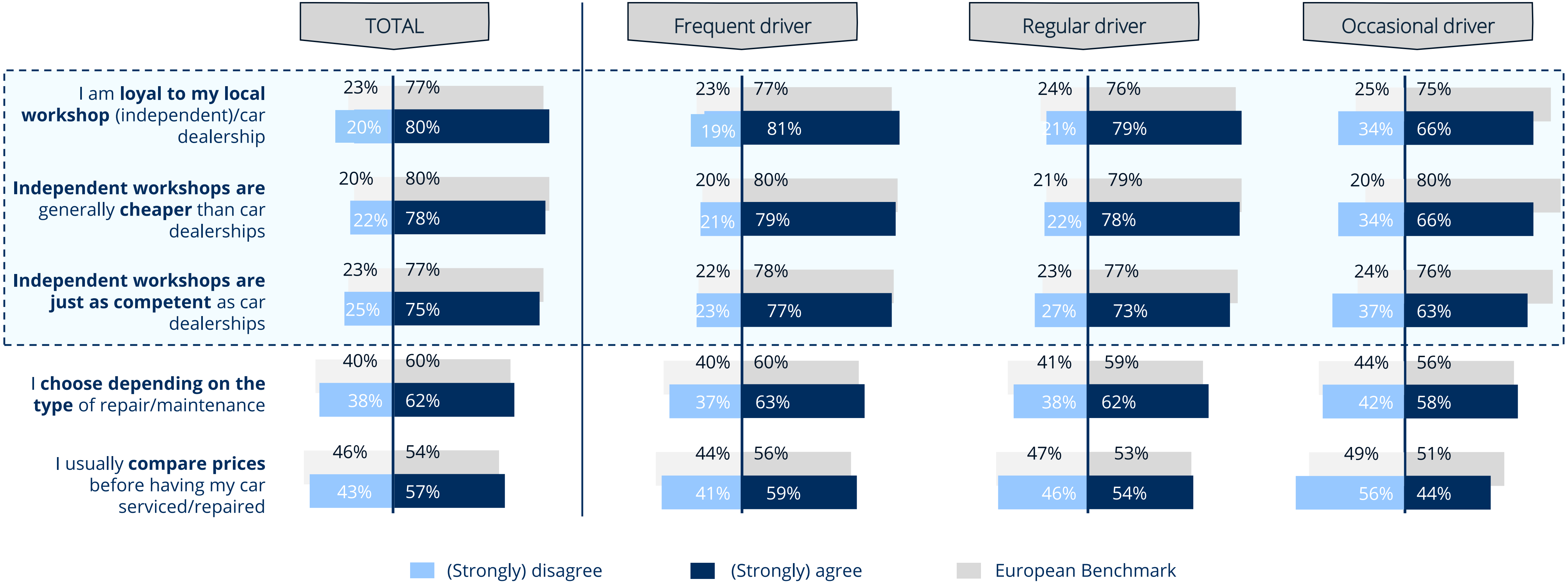


Question Q 1: What is your gender?, **Q 2:** How old are you?, **Q 10:** How old is your car?, **Q 40:** About how high is the annual gross income that your household has at its disposal, before tax and contributions?, **Q 43:** Are you currently member of motorist club?, **Q 11:** How did you acquire your car?, **Q 15:** What is your strategy of selecting a service/workshop for your car when needing regular maintenance?, **Q 28:** Would you consider paying for dedicated apps offered […]?, **Q 34:** Is your car connected?, **Q 39:** There is a debate whether legislation should, […]. What results would you expect from such regulations?
Bases: Italy: Total n= 1,000. **Source:** Statista Q 2023.

REGION I

Italian drivers are loyal to their local WS, perceive independent WSs as cheaper and at the same time consider them as competent as car dealerships

Top 5 statements about car repair/maintenance – by vehicle usage frequency
All respondents in %, top 2 and bottom 2 values shown

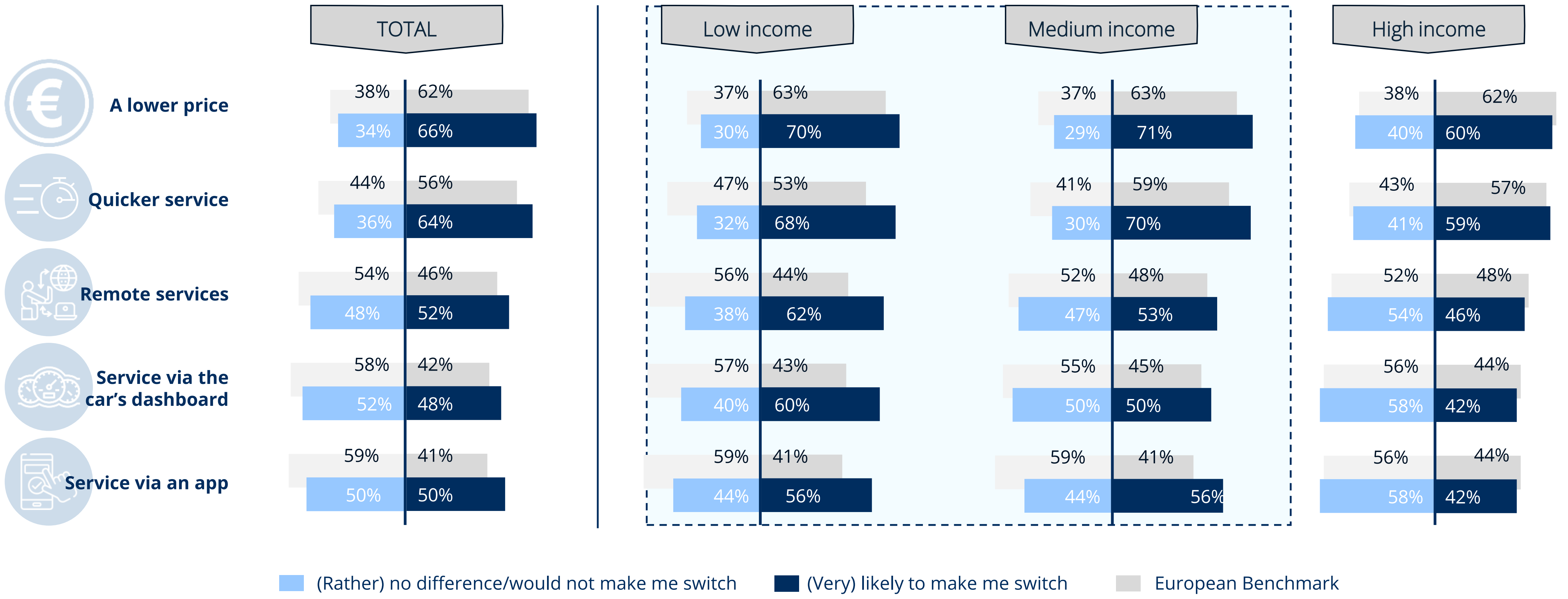


Question Q 19: For car repair/maintenance, to what extent would you agree with each of the following statements?
Bases: Italy: Total n= 1,000, Frequent driver n= 691, Regular driver n= 250, Occasional driver n= 59; **Europe:** Total n= 11,011, Frequent driver n= 6,295, Regular driver n= 3,891, Occasional driver n= 825. **Source:** Statista Q 2023.

REGION I

In Italy, willingness to switch to an independent WS is more pronounced among the low and middle-income-class than on average in Europe

Arguments for switching workshop type: **manufacturer to independent** – by income
Respondents who prefer manufacturer networks/workshops in %, top 2 and bottom 2 values shown

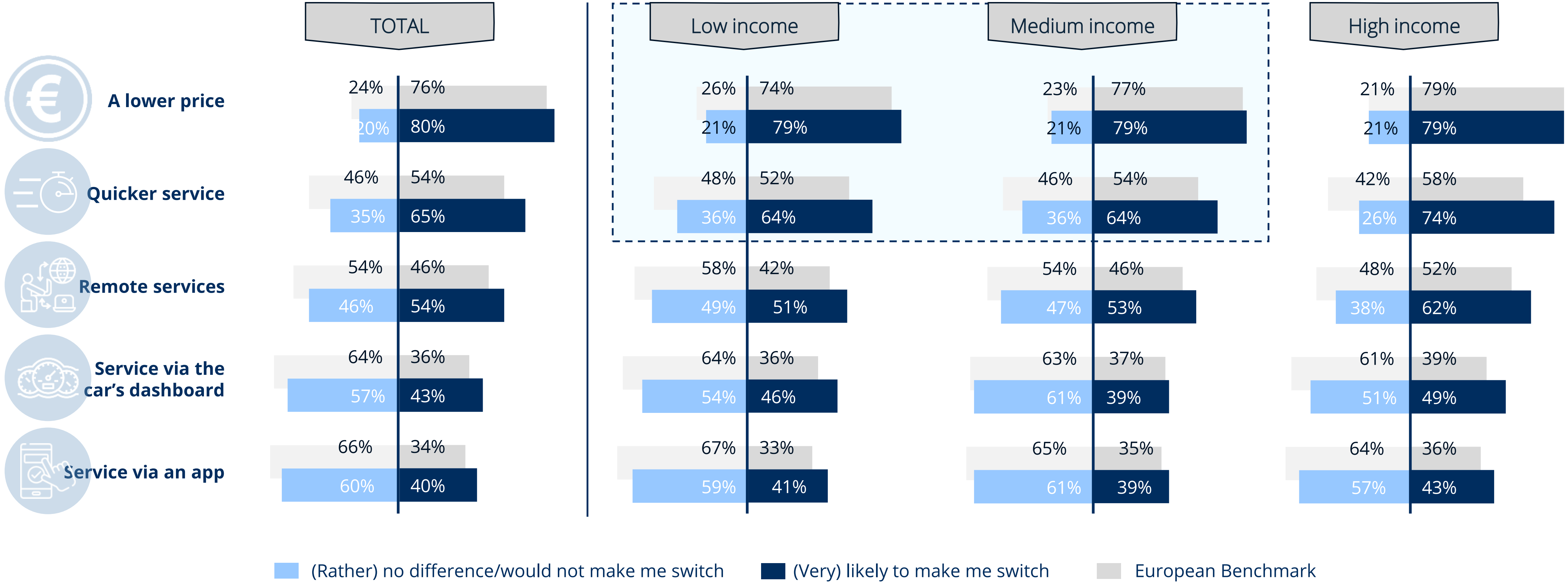


Question Q 20.1: How likely are you to switch to an independent workshop in the following situations? If the independent workshop...
Bases: Italy: Total n= 444, Low n= 87, Medium n= 155, High n= 179; **Europe:** Total n= 4,575, Low n= 1,007, Medium n= 1,455, High n= 1,767. **Source:** Statista Q 2023.

REGION I

Similar picture when it comes to switching to manufacturers – Price and quick service are the key factors

Arguments for switching workshop type: **independent to manufacturer** – by income
Respondents who prefer independent networks/workshops in %, top 2 and bottom 2 values shown



Question Q 20.2: How likely are you to switch to a manufacturer workshop in the following situations? If the manufacturer workshop….
Bases: Italy: Total n= 523, Low income n= 133, Medium income n= 196 , High income n= 148; **Europe:** Total n= 5,776, Low income n= 1,708, Medium income n= 1,973, High income n= 1,614. **Source:** Statista Q 2023

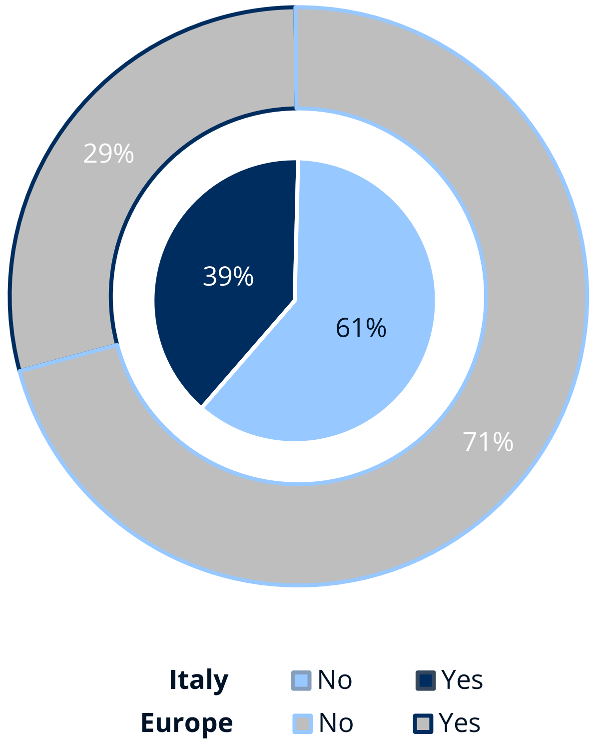
SMR Network

REGION I

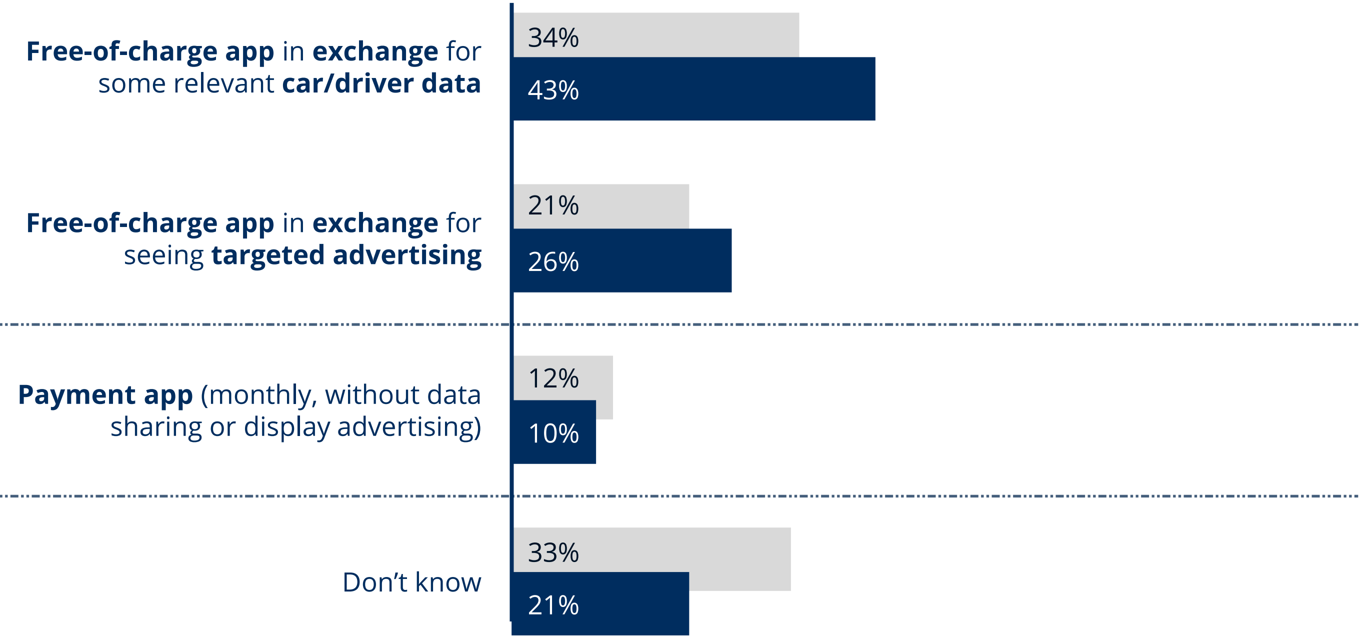
Among Italian drivers, willingness to pay for car apps is above European average – Nevertheless, free-of-charge apps in exchange for data are the most preferred

Considering paying for dedicated car apps and preferred service model
All respondents in %

Considering paying for car apps



Preferred car app service model

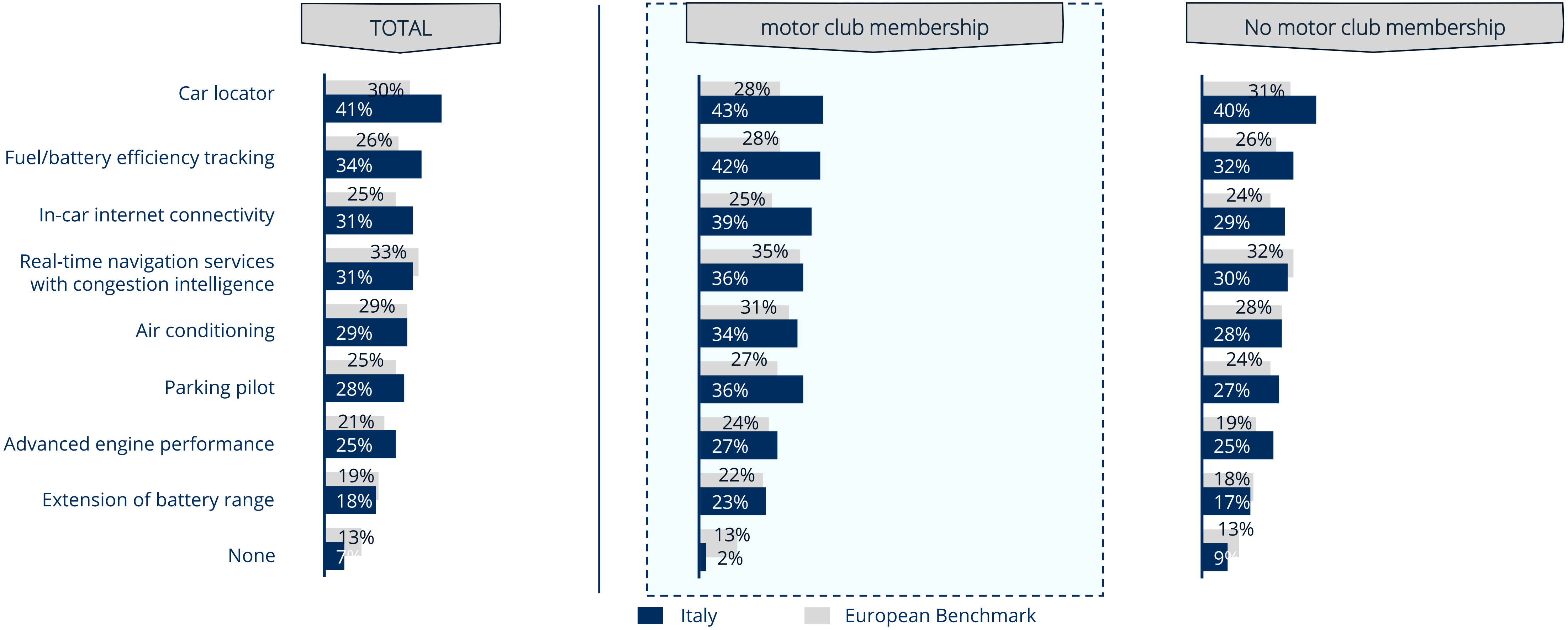


Question Q 28: Would you consider paying for dedicated apps offered exclusively for the cars display/screen?; **Question Q 29:** Dedicated car apps can be offered in various ways: Which of the following service models do you prefer?
Bases: Italy: Total n= 1,000; **Europe:** Total n= 11,011. **Source:** Statista Q 2023.

REGION I

In Italy, the willingness to pay for various connected car functions is above European benchmark – Especially among motor club members

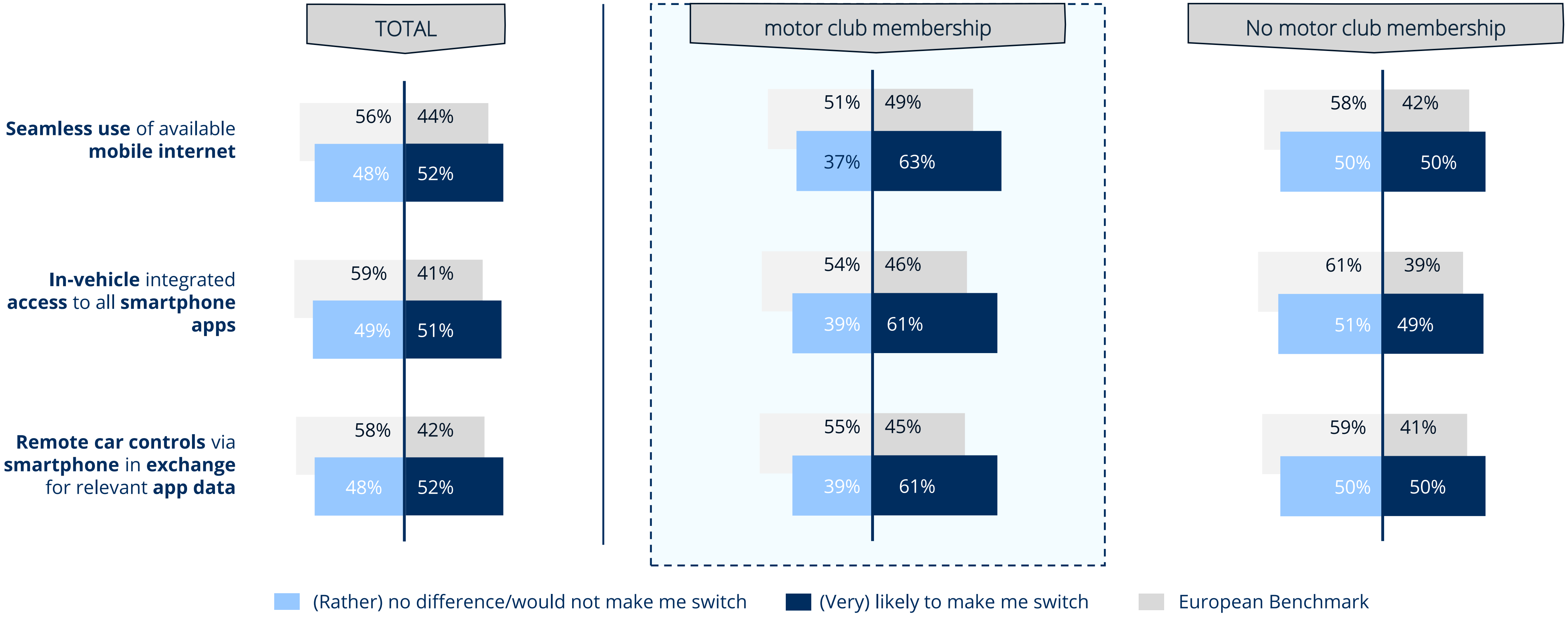
Services in a 'connected car' respondents are willing to pay for – by motor club membership
All respondents in %



Question Q 32: For which of the following services in a 'connected car', would you generally be willing to pay a monthly amount?
Bases: Italy: Total n= 1,000, motor club membership yes / no n= 190 / 810 ; **Europe:** Total n= 11,011, motor club membership yes / no n= 3,037 / 7,974. **Source:** Statista Q 2023.

Italian drivers show a high willingness to switch brand based on in-vehicle internet and app usage – Motor club members stand out once again

Willingness to switch the brand based on internet and app usage – by motor club membership
All respondents in %, top 2 and bottom 2 values shown



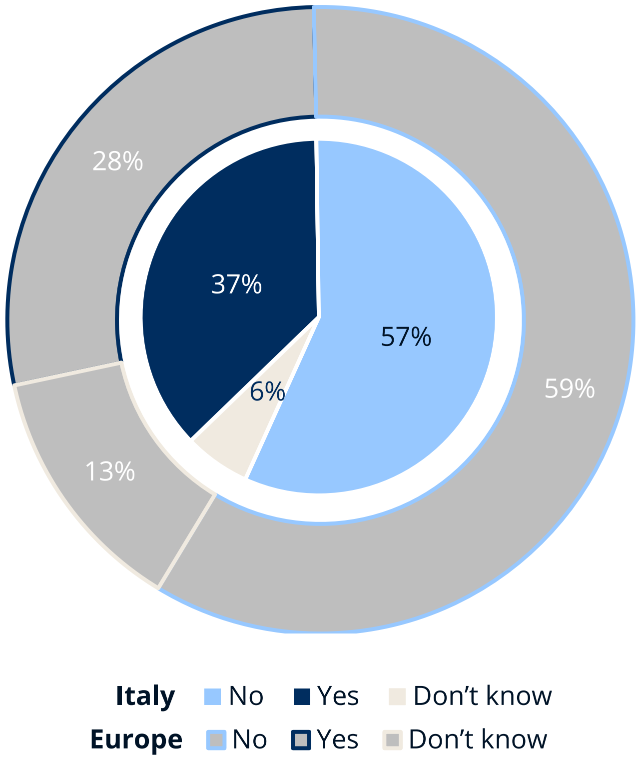
Question Q 31: To what degree would the following options with regards to the use of internet and apps make you consider to switch to another car brand? Another brand that…
Bases: Italy: Total n= 1,000, motor club membership yes / no n= 190 / 810; **Europe:** Total n= 11,011, motor club membership yes / no n= 3,037 / 7,974. **Source:** Statista Q 2023.

REGION I

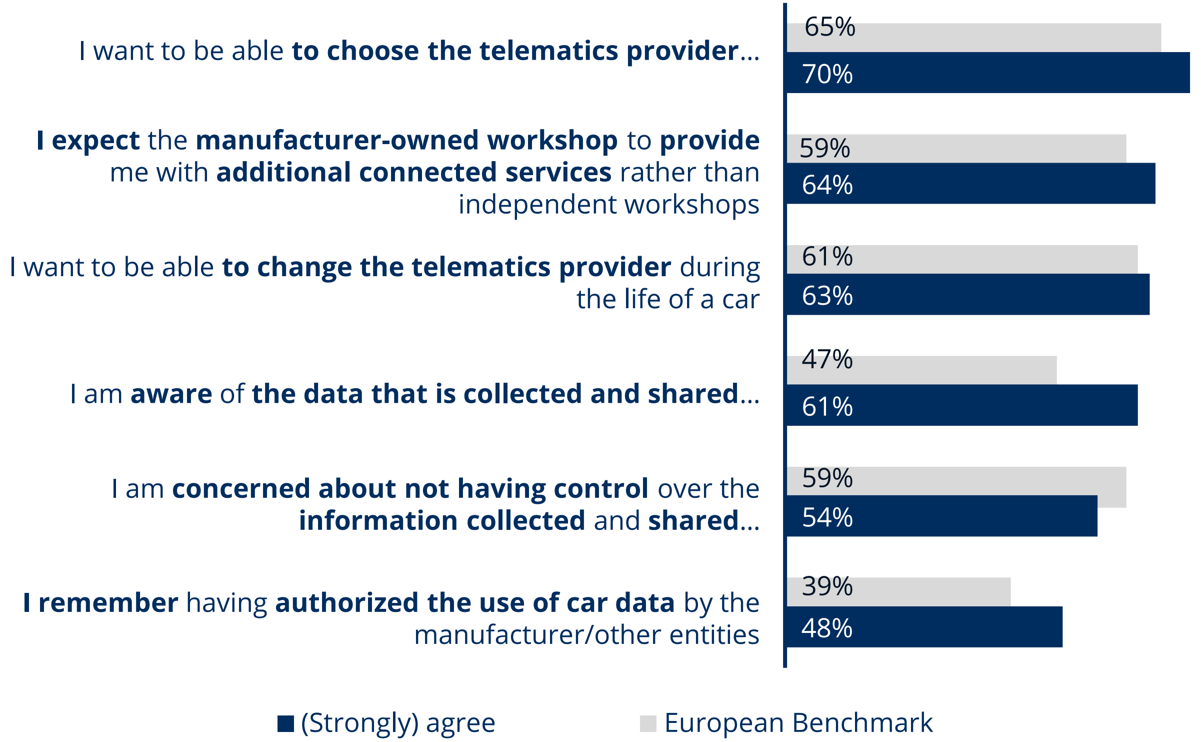
The share of connected cars is also above average in Italy – Being able to select the telematics provider is crucial for 7 out of 10 Italian drivers

'Connected car' and telematics
All respondents in % top 2 values for Q35 shown

Is your car „connected"?



How far do you agree with the following statements?

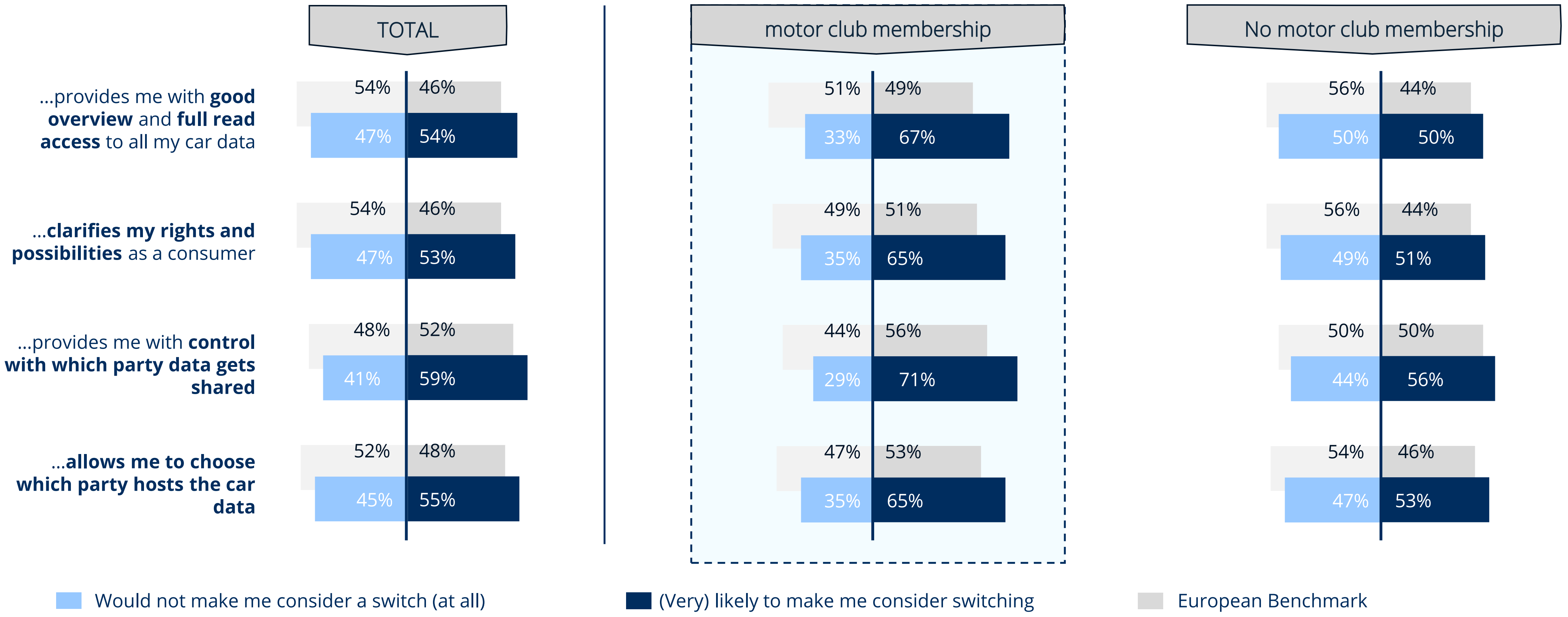


Question Q 34: Is your car "connected" (i.e. uses telematics)?; **Question Q 35:** How far do you agree with the following statements?
Bases: Italy: Total n= 1,000; **Europe:** Total n= 11,011. **Source:** Statista Q 2023.

FIA REGION I

In Italy, the percentage of drivers who would consider switching brands based on data sharing is above average – Especially among Motor club members

Willingness to switch the brand based on data sharing options – by motor club membership
All respondents in %, top 2 and bottom 2 values shown

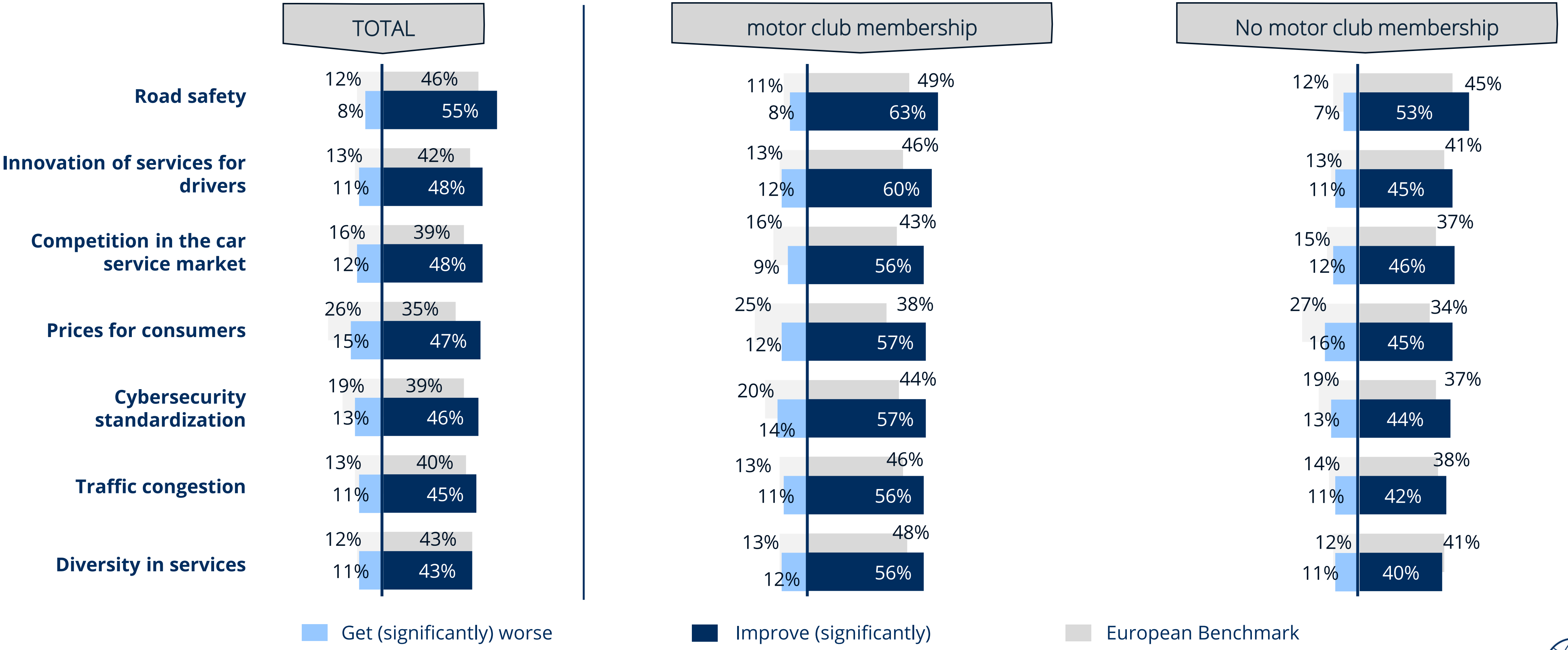


Question Q 38: To what degree would the following options with regards to usage of the car's data make you consider a switch to another car brand? Another brand that...
Bases: Italy: Total n= 1,000, motor club membership yes / no n= 190 / 810; **Europe:** Total n= 11,011, motor club membership yes / no n= 3,037 / 7,974. **Source:** Statista Q 2023.

REGION I

Italian drivers anticipate many benefits through legislative regulation – Both motor club members & non-members expectations are above average

Expectations about legislative regulation impact – by motor club membership
All respondents in %, top 2 and bottom 2 values shown



Question Q 39: There is a debate whether legislation should, as it did in banking, impose car manufacturers to grant qualified third parties automated data access when a car owner authorizes this. What results would you expect from such regulations?
Bases: Itlay: Total n= 1,000, motor club membership yes / no n= 190 / 810; **Europe:** Total n= 11,011, motor club membership yes / no n= 3,037 / 7,974. **Source:** Statista Q 2023

Country Deep Dive
Spain

Spain Management Summary

SPANISH INDEPENDENT WORKSHOPS HAVE A GOOD IMAGE AMONG DRIVERS – MANY CONSIDER SWITCHING TO INDEPENDENT WORKSHOPS

- In Spain, both manufacturer and independent workshops are being used equally. Many drivers – including those currently preferring manufacturer workshops – perceive **independent workshops** as **lower in price**, while providing **same quality of work**.
- As a result, **more than half of the drivers preferring manufacturers** would **switch to an independent workshop** for any of the listed reasons. While **price and quick service are the main reasons** to switch across all age groups, young drivers are also very attracted by remote, or digital services.
- Reasons to switch from independent to a manufacturer workshop is mostly for **price and service speed reasons**. This is especially relevant for young drivers (18–34-year-olds).

OPTIMISM IN SPAIN: HIGH FAMILIARITY WITH CONNECTED CARS, OPTIMISM ABOUT DATA SHARING AND REGULATION IMPACT

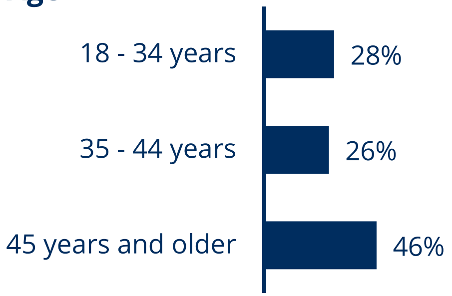
- In Spain, **more than 1 in 3 would consider paying for car apps**. If given the choice, though, almost 70% would rather exchange their car/driver data or watch targeted advertising for a free-of-charge app.
- With **more than 1 in 3 drivers owning a car with a telematics system**, Spain is among the countries with the highest share of connected cars. Accompanied by the familiarity with telematics, concerns about **data protection** are **present**.
- Hence, many **Spanish drivers are willing to switch brands** based on data sharing options **to remain in control** of where the car data is hosted and whom it gets shared with.

1 in 3 Spanish drivers has a connected car – 37% have a positive attitude towards legislative market developments

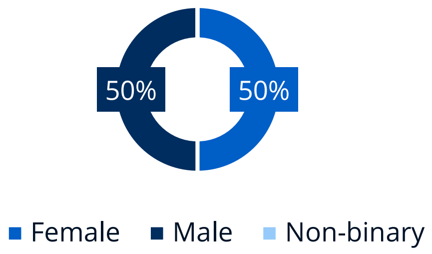
Country Characteristics Spain

SOCIODEMOGRAPHICS & MEMBERSHIP

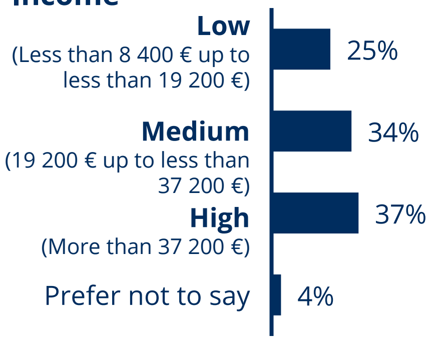
Age



Gender



Income



Motor club Membership

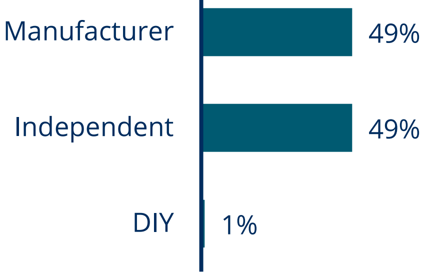
11% Yes

No **89%**

VEHICLE & ATTITUDE

Vehicle Ownership

SMR Preference



Vehicle Age

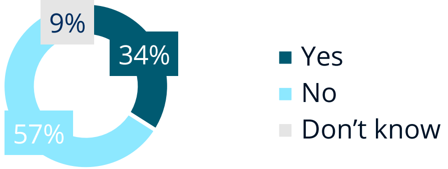
7 years (Median)

Willingness to Pay for Car Apps

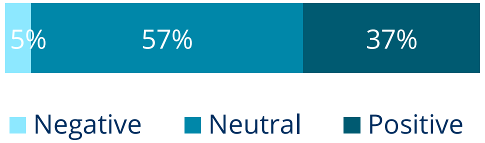
36% Yes

No **64%**

Connected Car



Attitude towards (Legislative) Market Development



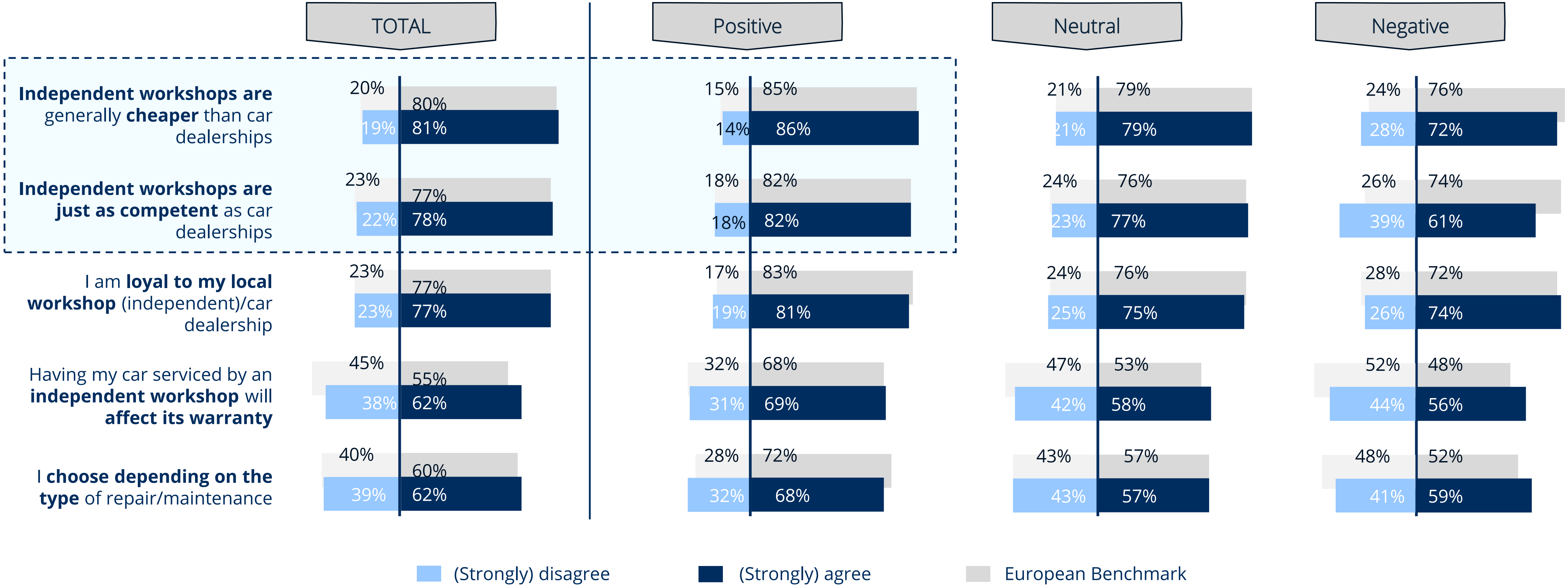
Question Q 1: What is your gender?, **Q 2:** How old are you?, **Q 10:** How old is your car?, **Q 40:** About how high is the annual gross income that your household has at its disposal, before tax and contributions?, **Q 43:** Are you currently member of motorist club?, **Q 11:** How did you acquire your car?, **Q 15:** What is your strategy of selecting a service/workshop for your car when needing regular maintenance?, **Q 28:** Would you consider paying for dedicated apps offered […]?, **Q 34:** Is your car connected?, **Q 39:** There is a debate whether legislation should, […]. What results would you expect from such regulations?
Bases: Spain: Total n= 1,000. **Source:** Statista Q 2023.

REGION I

SMR Network

In Spain, independent WS are perceived as cheaper, yet competent – Especially among those with positive attitude towards market/legislative developments

Top 5 statements about car repair/maintenance – by attitude towards (legislative) market developments
All respondents in %, top 2 and bottom 2 values shown

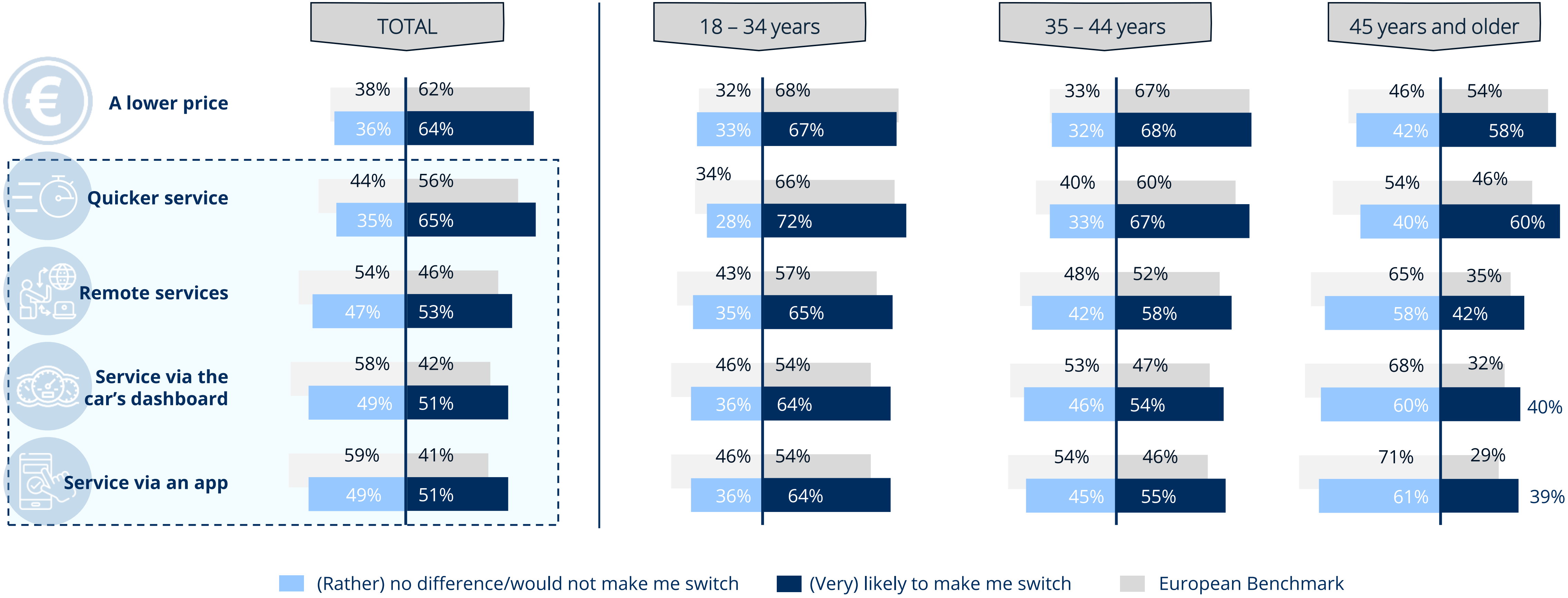


Question Q 19: For car repair/maintenance, to what extent would you agree with each of the following statements?
Subgroups for attitude towards (legislative) market developments are calculated based on the average of Q39 (1, 2=Get (significantly) worse; 3=Remain unchanged; 4,5=Improve (significantly): Positive > 3.9, Neutral = 2.5 to 3.9, Negative < 2.5.
Bases: Spain: Total n= 1,000, Positive n= 373, Neutral n= 573, Negative n= 54; **Europe:** Total n= 11,011, Positive n= 2,344, Neutral n= 7,574, Negative n= 1,093. **Source:** Statista Q 2023.

REGION I

Quicker, remote or digital services are more relevant for switching to independent WS than in the rest of Europe

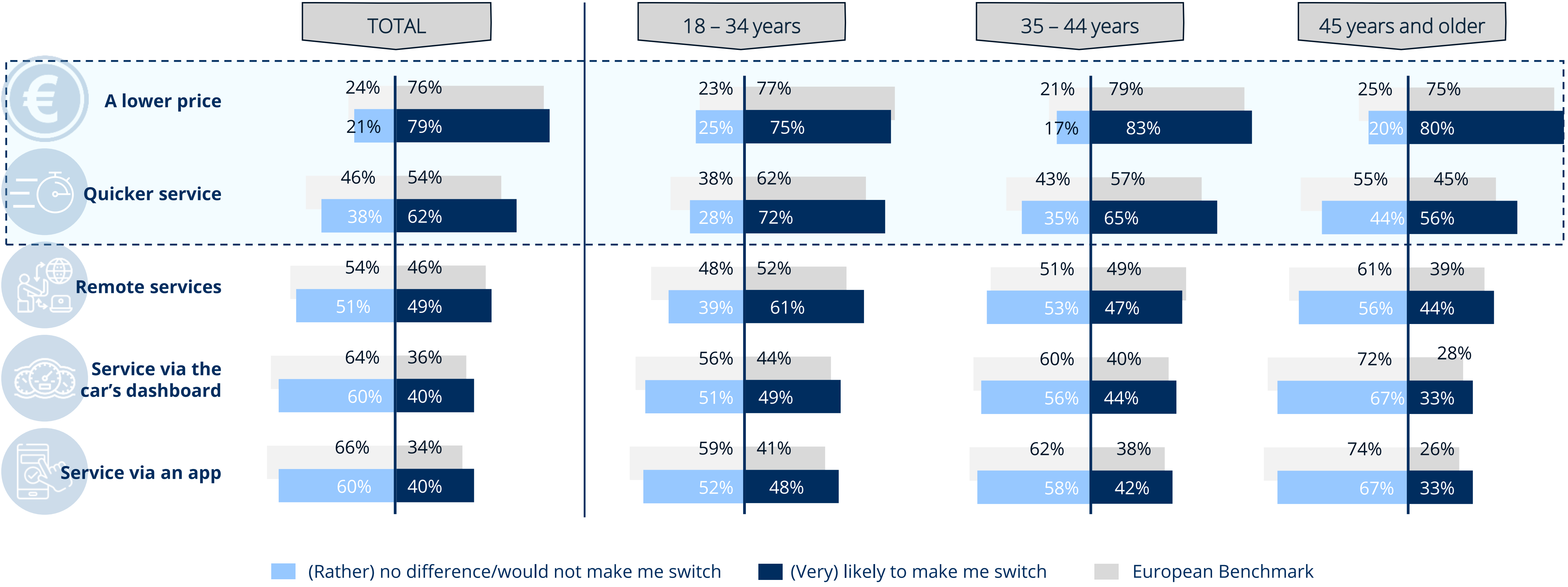
Arguments for switching workshop type: **manufacturer to independent** – by age
Respondents who prefer manufacturer networks/workshops in %, top 2 and bottom 2 values shown



Question Q 20.1: How likely are you to switch to an independent workshop in the following situations? If the independent workshop…
Bases: Spain: Total n= 492, 18-34 years n= 141, 35-44 years n= 141, 45 years and older n= 210; **Europe:** Total n= 4,575, 18-34 years n= 1,440, 35-44 years n= 1,083, 45 years and older n= 2,052. **Source:** Statista Q 2023.

Main reason to switch to a manufacturer would by far be a lower price – Quicker service is more relevant in younger age groups

Arguments for switching workshop type: independent to manufacturer – by age
Respondents who prefer independent networks/workshops in %, top 2 and bottom 2 values shown



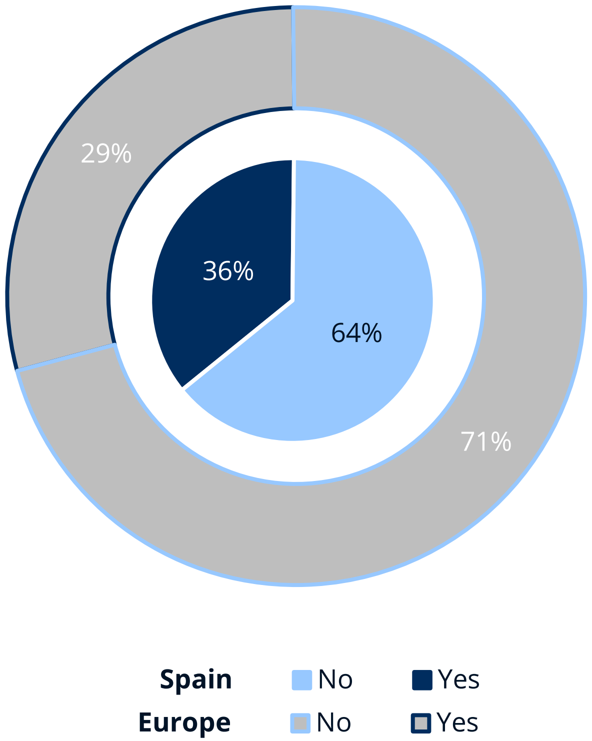
Question Q 20.2: How likely are you to switch to a manufacturer workshop in the following situations? If the manufacturer workshop....
Bases: Spain: Total n= 491, 18-34 years n= 134, 35-44 years n= 118, 45 years and older n= 239; **Europe:** Total n= 5,776, 18-34 years n= 1,919, 35-44 years n= 1,313, 45 years and older n= 2,544. **Source:** Statista Q 2023.

REGION I

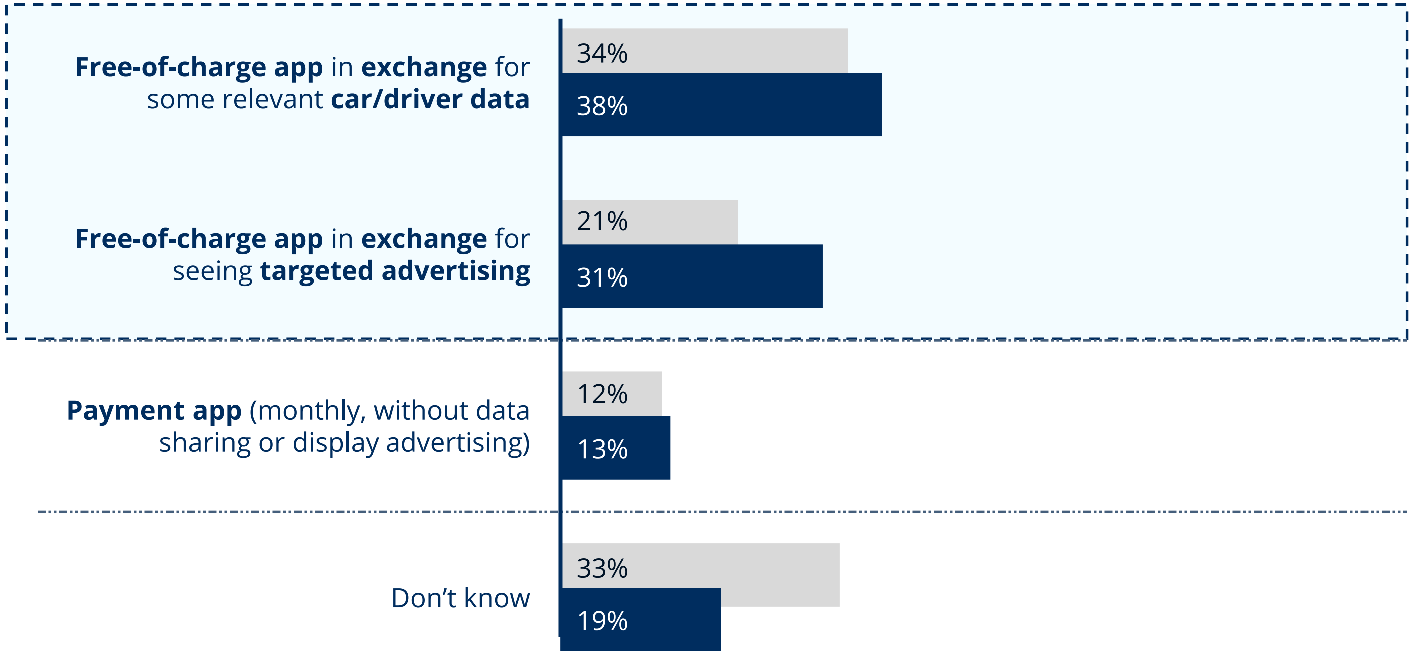
More than a third is willing to pay for car apps – Still, the preferred app service model is a free-of-charge app in exchange for data or ads

Considering paying for dedicated car apps and preferred service model
All respondents in %

Considering paying for car apps



Preferred car app service model

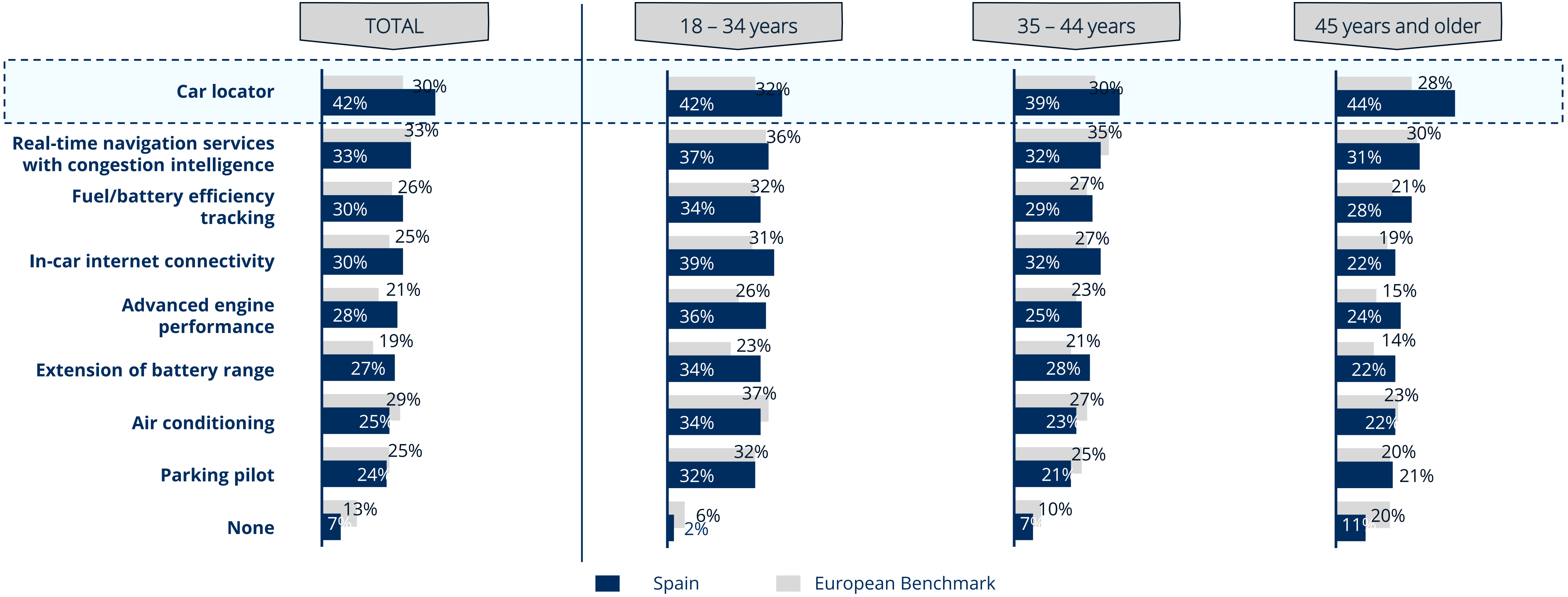


Question Q 28: Would you consider paying for dedicated apps offered exclusively for the cars display/screen?; **Question Q 29:** Dedicated car apps can be offered in various ways: Which of the following service models do you prefer?
Bases: Spain: Total n= 1,000; **Europe:** Total n= 11,011. **Source:** Statista Q 2023.

FIA REGION I

Spanish drivers favour a car locator and are much more willing to pay for it than European average

Services in a 'connected car' respondents are willing to pay for – by age
All respondents in %



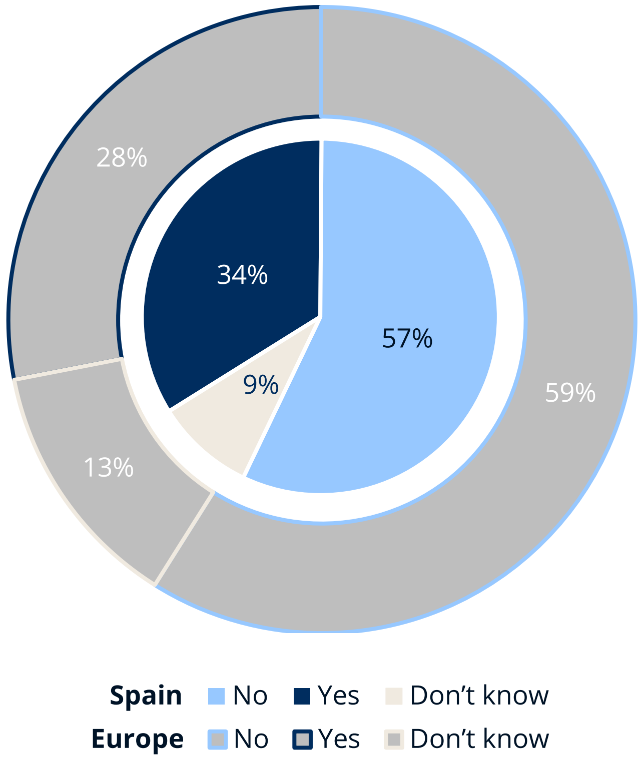
Question Q 32: For which of the following services in a 'connected car', would you generally be willing to pay a monthly amount?
Bases: Spain: Total n= 1,000, 18-34 years n= 283, 35-44 years n= 262, 45 years and older n= 455; **Europe:** Total n= 11,011, 18-34 years n= 3,656, 35-44 years n= 2,542, 45 years and older n= 4,813. **Source:** Statista Q 2023.

REGION I

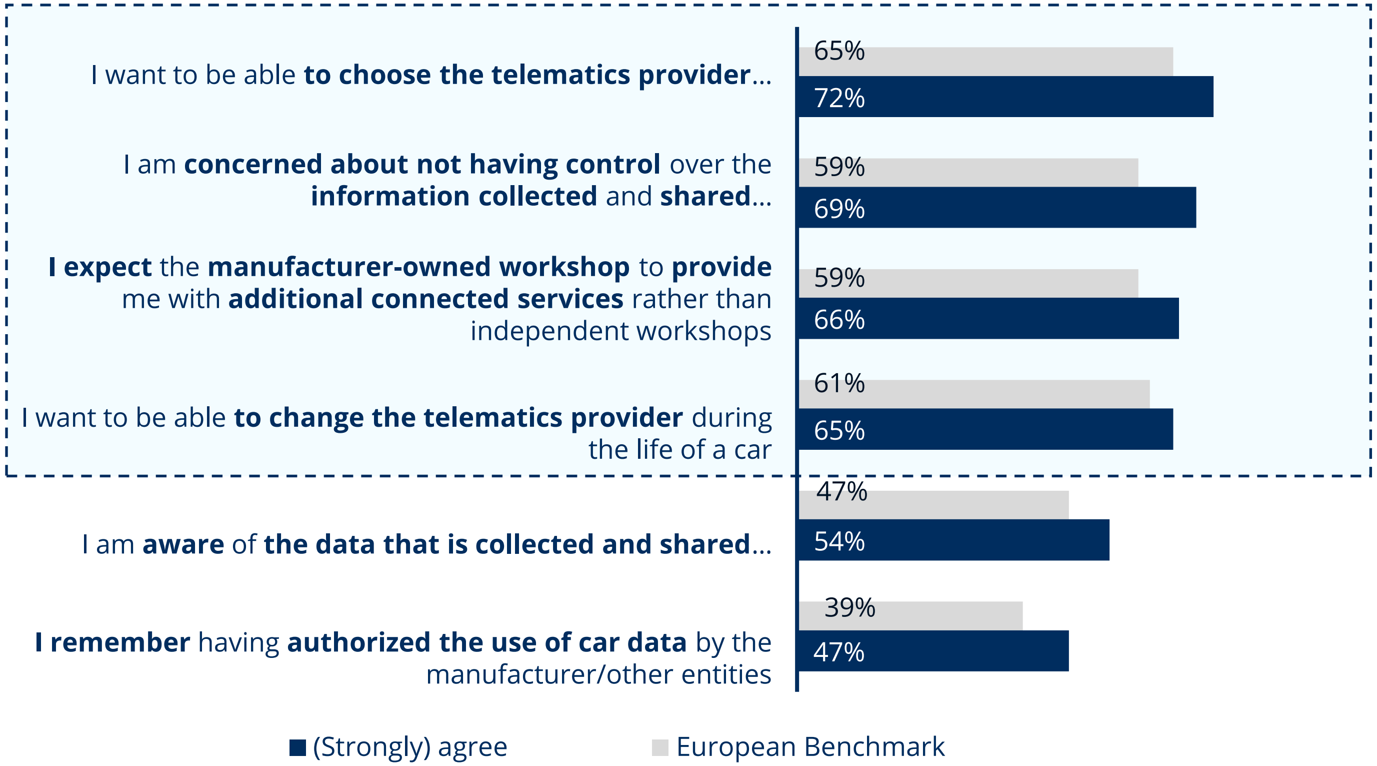
Connected cars are more common in Spain – provider selection is key to addressing concerns for more than half of the Spanish car drivers

'Connected car' and telematics
All respondents in % top 2 values for Q35 shown

Is your car „connected"?



How far do you agree with the following statements?

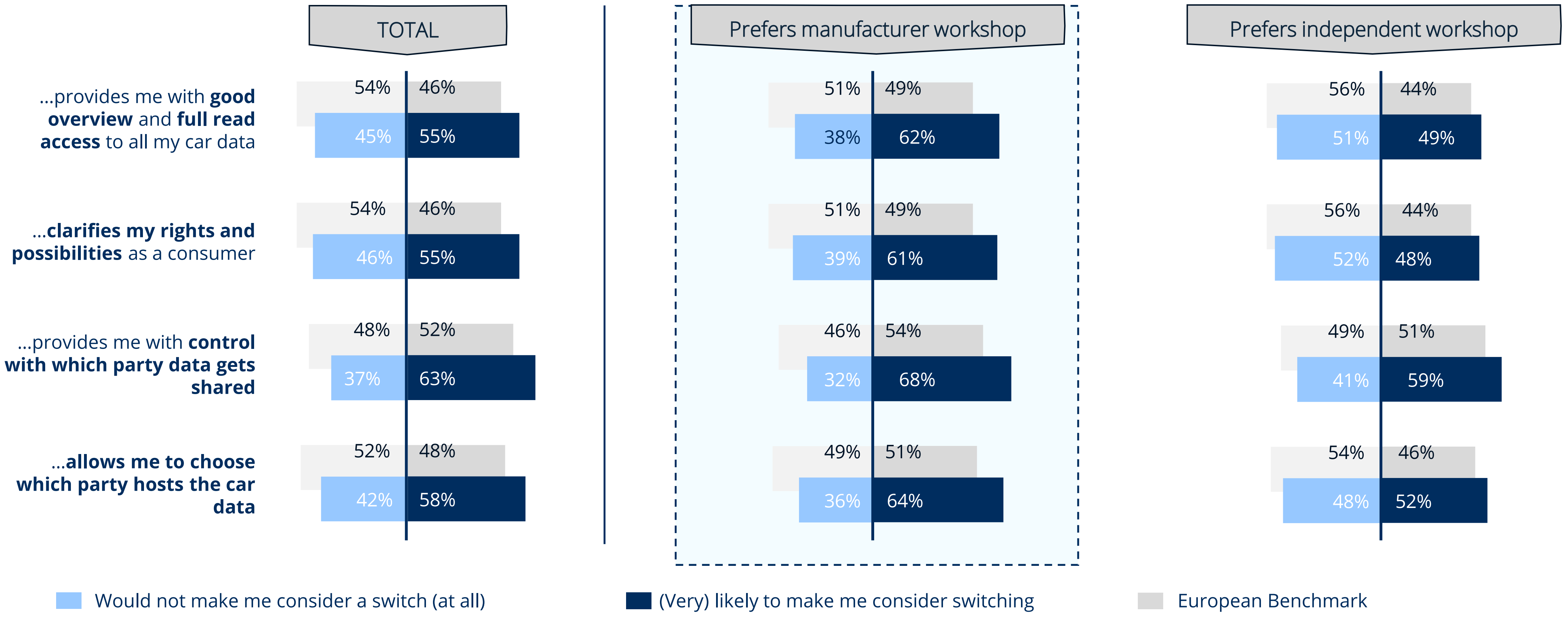


Question Q 34: Is your car "connected" (i.e. uses telematics)?; **Question Q 35:** How far do you agree with the following statements?
Bases: Spain: Total n= 1,000; **Europe:** Total n= 11,011. **Source:** Statista Q 2023.

FIA REGION I

In general, Spanish drivers are more willing to switch brand based on data sharing options – Especially among preferers of manufacturer WSs

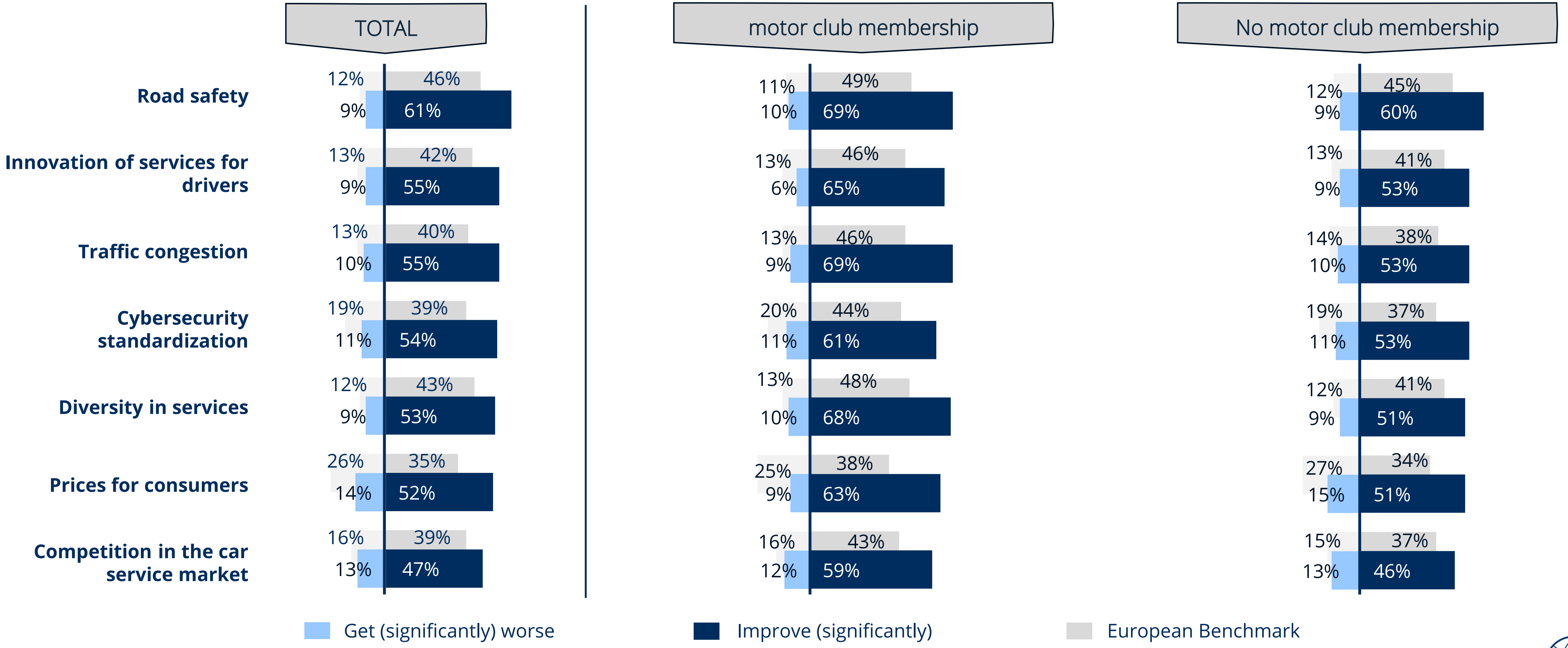
Willingness to switch the brand based on data sharing options – by SMR workshop preference (DIY not displayed)
All respondents in %, top 2 and bottom 2 values shown



Question Q 38: To what degree would the following options with regards to usage of the car's data make you consider a switch to another car brand? Another brand that...
Bases: Spain: Total n= 1,000, Prefers manufacturer workshop n= 492, Prefers independent workshop n= 491; **Europe:** Total n= 11,011, Prefers manufacturer workshop n= 4,575, Prefers independent workshop n= 5,776.
Source: Statista Q 2023.

Drivers and esp. motor club members expect improvements due to legislative regulations – Spanish with a more positive attitude than the European average

Expectations about legislative regulation impact – by motor club membership
All respondents in %, top 2 and bottom 2 values shown



Question Q 39: There is a debate whether legislation should, as it did in banking, impose car manufacturers to grant qualified third parties automated data access when a car owner authorizes this. What results would you expect from such regulations?
Bases: Spain: Total n= 1,000, motor club membership yes / no n= 112 / 888; **Europe:** Total n= 11,011, motor club membership yes / no n= 3,037 / 7,974. **Source:** Statista Q 2023

FIA REGION I

Reach out to us – Your Statista Q Team

Farina Klein

Market Research Analyst

Hendrik Heidbüchel

Market Research Analyst

Yordanka Zetina

Market Research Senior Analyst

Henning Sauerland

Market Research Team Lead