EUROPEAN
BUREAU

UNDERSTANDING DRIVERS' PREFERENCES AND ATTITUDES IN EUROPE

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SUMMARY

The FIA European Bureau (EB) commissioned a survey to assess drivers' awareness on connected vehicles, and their preferences towards vehicle maintenance and in-vehicle data collection.

This survey should be seen in conjunction with the previous FIA EB survey on European attitudes towards connected vehicles from 2016. In this edition of the survey, questions were added regarding prices and preferences of drivers when it comes to maintenance services on their vehicles. The survey covers 11 countries (Germany, Spain, Italy, France, Finland, Denmark, Poland, Belgium, the Netherlands, Austria and the Czech Republic) and has a sample size of 11,011 total respondents.

The results of this year's survey show that 59% do not think their car is connected. Many drivers are concerned about not having control on personal data collection in their vehicles, such as phone call history and contacts. 61% of respondents do not remember authorizing car data use by their vehicle manufacturer or other entities. Consumers should be better informed about connected vehicles, their functions, benefits and limitations.

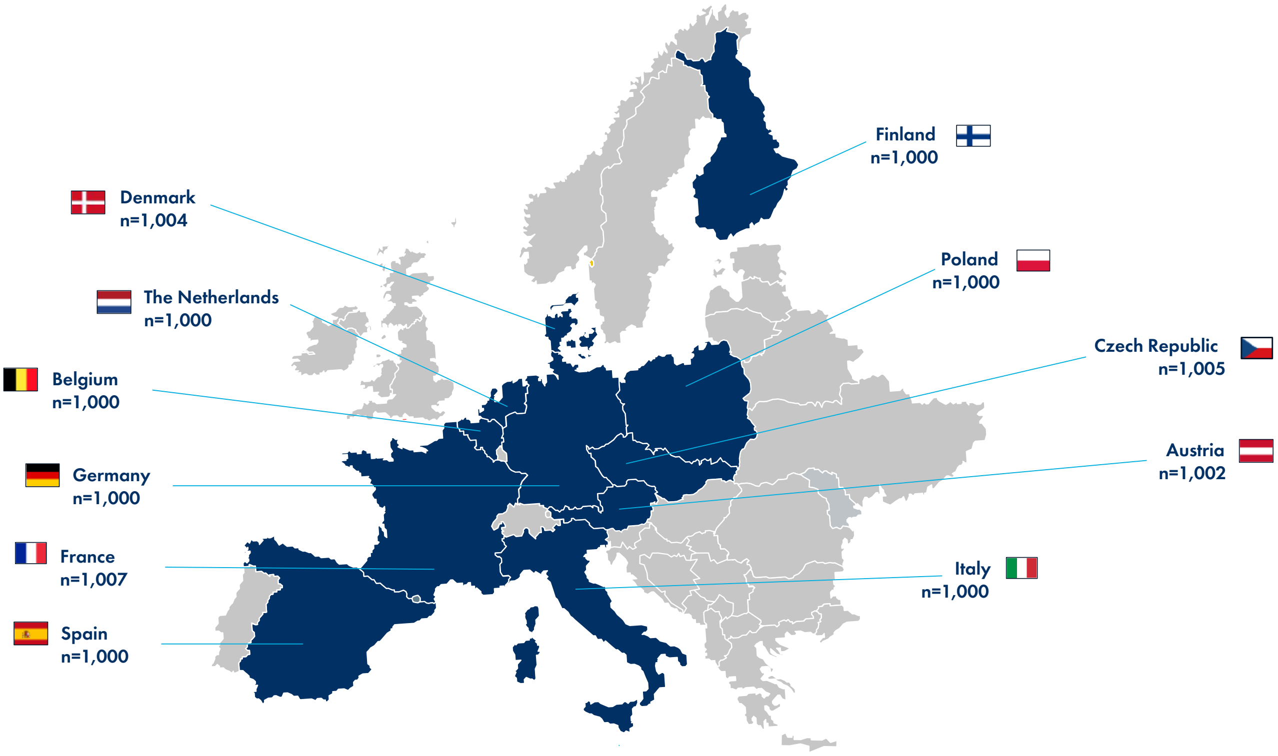
In terms of pricing and maintenance services, the survey finds that 62% are ready to switch from manufacturer workshops to independent workshops if prices are lower. If services are delivered quicker, 56% are willing to switch from a manufacturer workshop to an independent workshop. Similar responses were found for respondents who would switch from an independent workshop to a manufacturer workshop. Prices, speed of service delivery and availability of remote services would entice drivers to make the switch.

Freedom of choice remains important for drivers. 65% want to be able to choose the telematics provider for their car while 61% want to be able to change the telematics provider during their car's lifetime. The survey finds that people are willing to share their data depending on what service is being given in return. While many are not willing to pay for all services, car-location services and roadside assistance services are a few examples that consumers would be willing to pay for.

With all of the above in mind, drivers do expect certain outcomes from sector-specific legislation. These expectations include a wider array of services, more innovative services and specific services regarding traffic congestion and road safety.

STUDY BACKGROUND

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



The FIA EB has run several market research projects to understand drivers' habits and preferences about their cars and attitudes towards different topics.

The 2016 FIA EB MyCarMyData survey provided interesting figures, which have helped backing our advocacy recommendations around access to vehicle data and data privacy. Its findings have also been quoted in several studies, both from the European Commission and stakeholders.

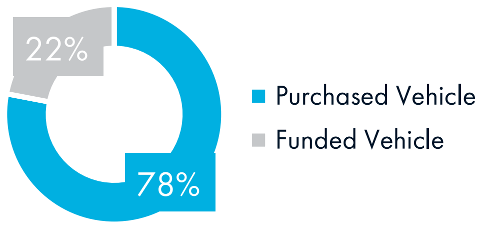
In the past years, the number of connected vehicles and related services offered to consumers has risen. The 2021 FIA EB GDPR application study surveyed thousands of European consumers on the topic of data privacy, however, the aspects around consumer preferences and competition, has not been studied since 2016. Thus, the FIA EB commissioned Statista to survey consumers regarding prices and preferences of drivers when it comes to maintenance services on their vehicles.

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.

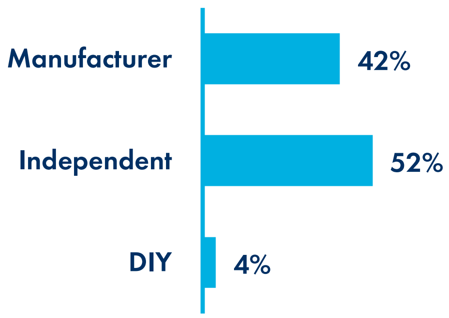
UNDERSTANDING DRIVERS' PREFERENCES AND ATTITUDES IN EUROPE

VEHICLE & ATTITUDE

Vehicle Ownership



SMR Preference



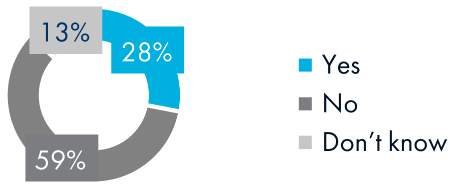
Vehicle Age

7 years (Median)

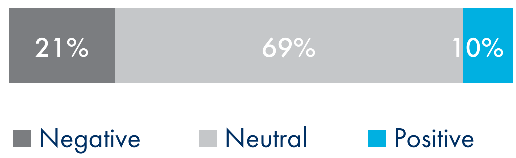
Willingness to Pay for Car Apps

29% Yes No **71%**

Connected Car



Attitude towards (Legislative) Market Development

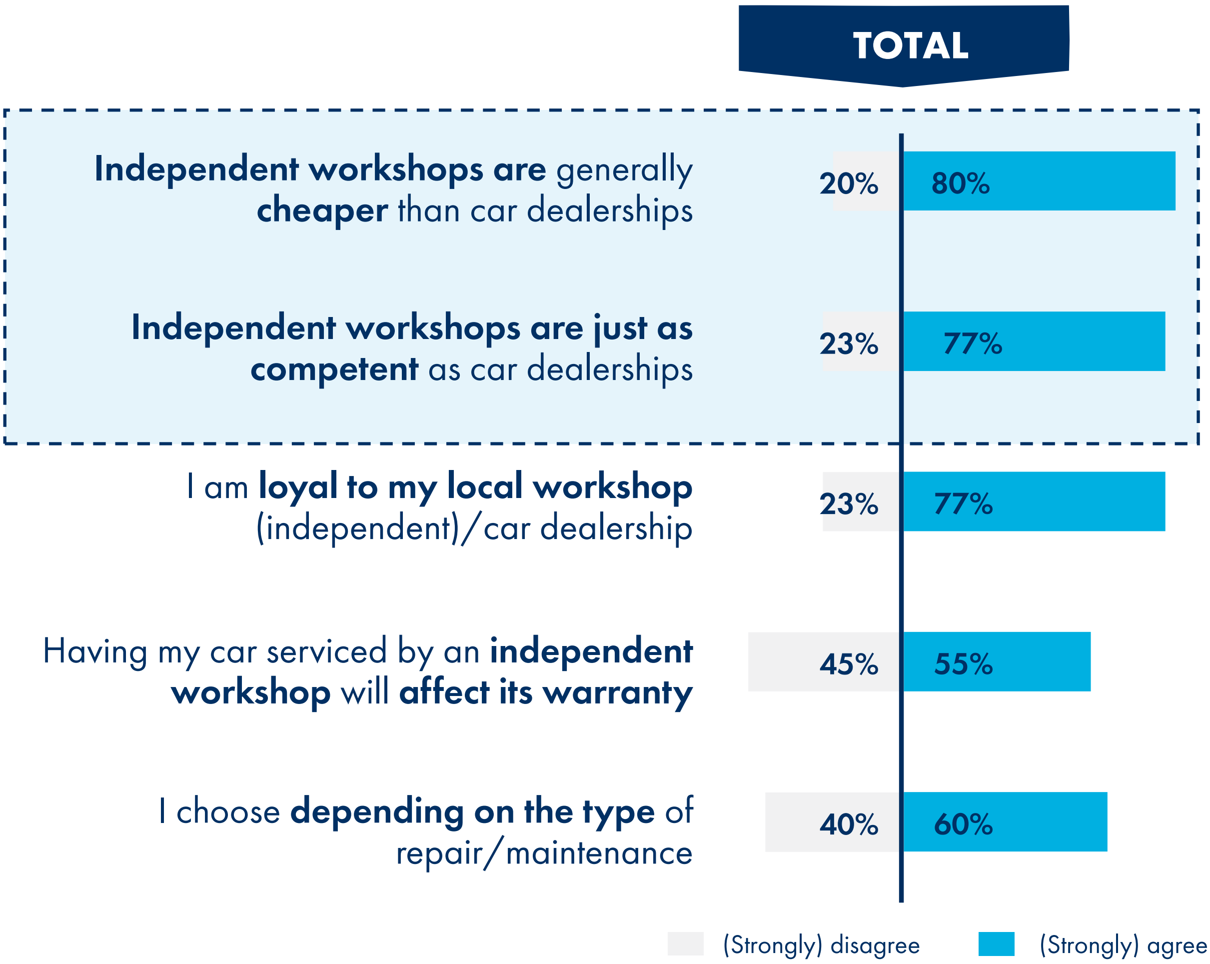


Drivers prefer going to independently owned workshops compared to manufacturer workshops for service, maintenance and repair (SMR). There are many factors that affect this choice which will be shown in later sections.

When it comes to vehicle ownership, 78% of respondents purchased their vehicle while 22% are funded vehicles (i.e., company vehicles). 59% do not think their vehicle is connected while 28% think it is connected – the rest do not know. In terms of payment for additional services, 71% were not willing to pay for car apps.

VEHICLE MAINTENANCE ATTITUDES

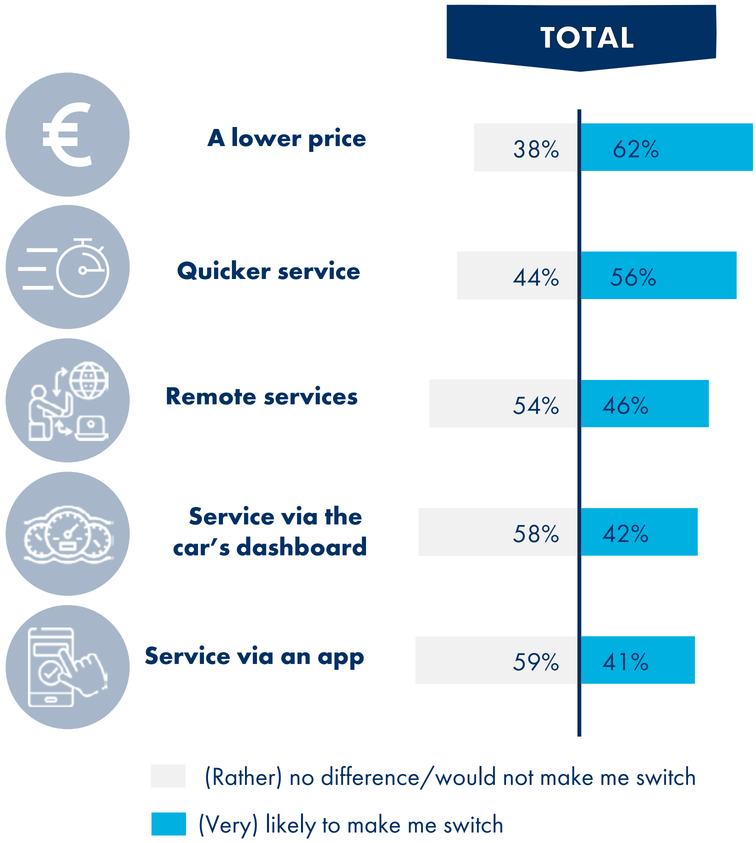
Top 5 statements about car repair/maintenance – by age
All respondents in %, top 2 and bottom 2 values shown



8 in 10 of the respondents believed that independent workshops were cheaper, but just as competent. Younger people more likely to believe that going to an independent repairer may impact the warrantee. However, there is legislation in place to ensure consumers' rights to go to an independent workshop**.** About 60% say that they will chose where to go based on the repair type.

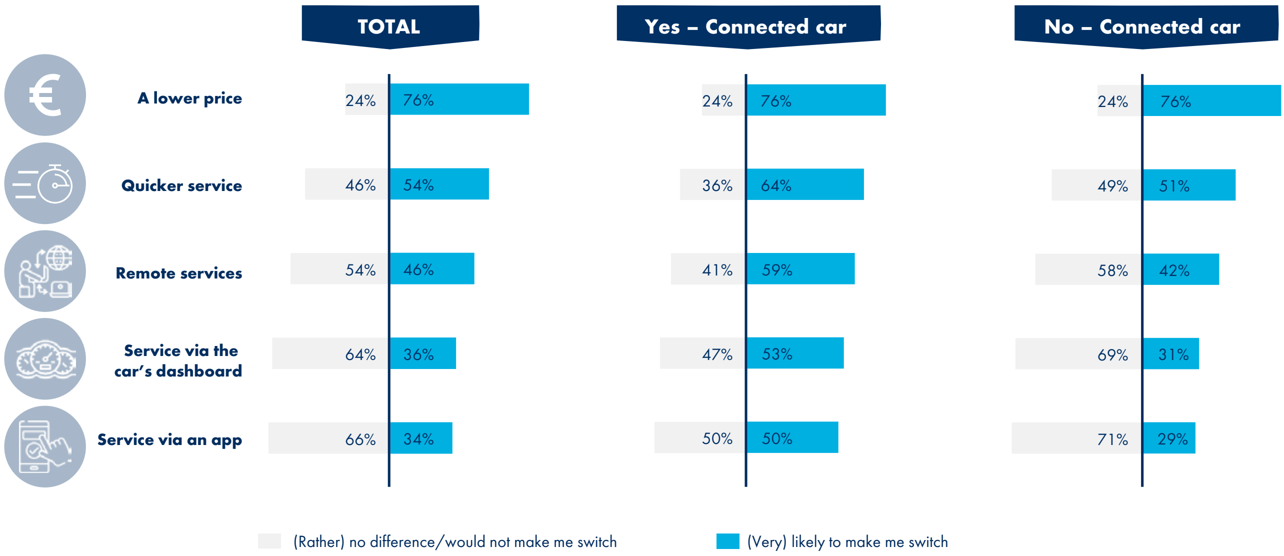
PRICES AND SERVICE DELIVERY AFFECT DRIVERS' PROVIDER CHOICE FOR MAINTENANCE OR REPAIR

Drivers are willing to switch to an independent workshop when prices are lower and where services are quicker. For vehicle owners who are aware of connected cars, they are more willing to switch to an independent workshop for quicker service, remote service and service via the dashboard. When awareness about the options grows, consumers are more willing to switch for a specific service (speed, remote, on the dashboard). Unless there is full competition in the aftermarket, based on legislation, this is unlikely to happen. The willingness to switch for those with a connected car is just above 50% and could have significant impact on the aftermarket.



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



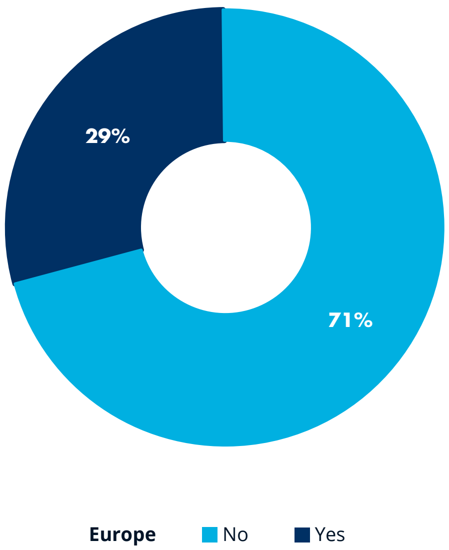
Drivers usually going to independent workshops seem to have a higher sensitivity to price, 76% would be willing to switch to manufacturer workshops for lower prices (compared to 62% from manufacturers to independent workshops). There is slightly less willingness to switch to get services on the dashboard or via in-vehicle apps. One could assume that it is because most respondents currently get this service and do not see it as a competitive advantage. The percentage of the users with a connected car are very similar in both cases, around 50%.

DRIVERS ATTITUDES TOWARDS IN-VEHICLE APPS AND SERVICES

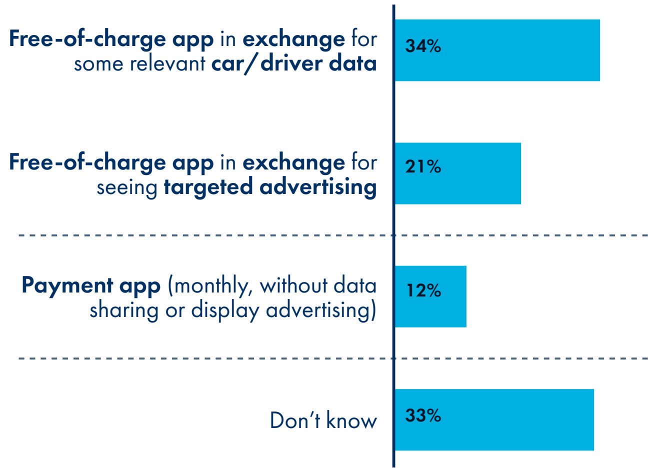
Around 1/3 of the drivers consider paying for car apps – Preferred service model: Free-of-charge in exchange for data, but many are still undecided

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

Considering paying for car apps



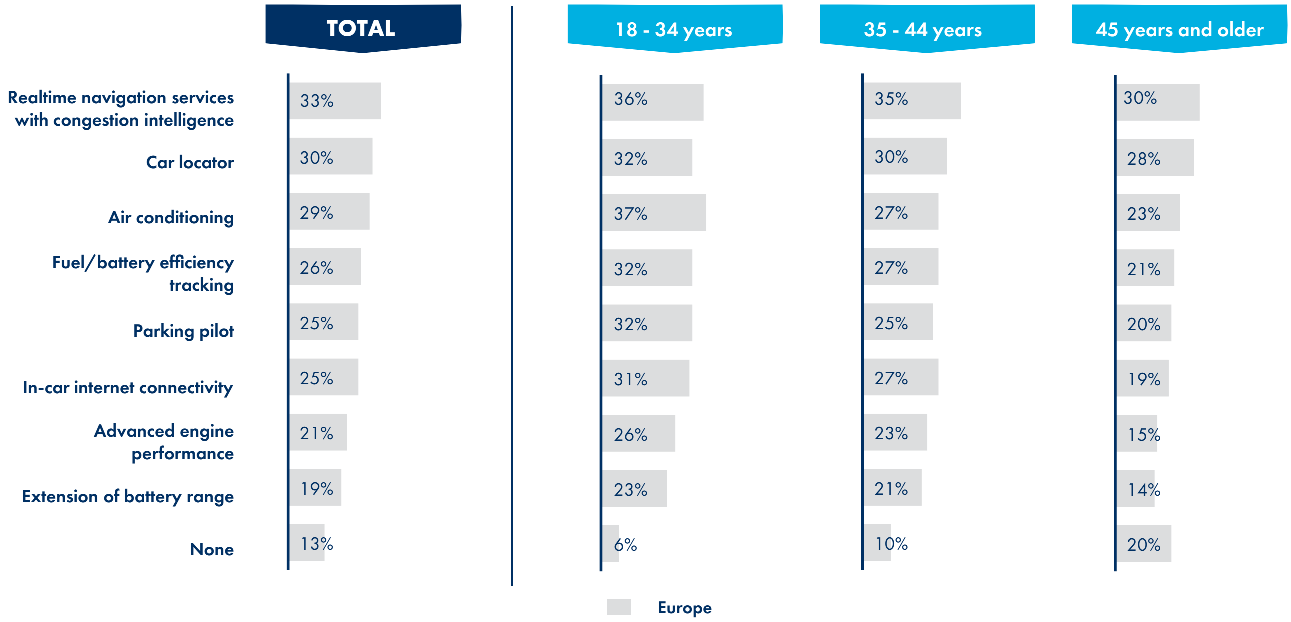
Preferred car app service model



While only 29% consider paying for car apps, drivers have a preference for specific car app service models. More than 50 % consider that their data or targeted advertising should be the way to pay for the service but only 12% would consider paying monthly for a service.

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

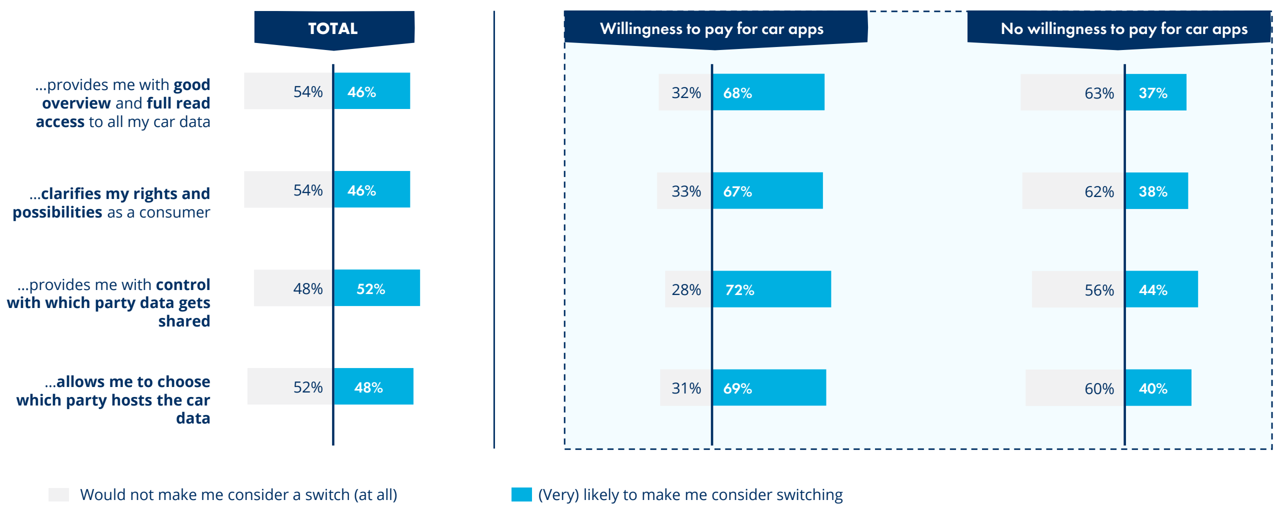
Services in a 'connected car' respondents are willing to pay for – by age
All respondents in %



The most sought-after services that drivers are willing to pay are real-time navigation services with congestion intelligence and car locator. Younger drivers (18-34 years old) are also more willing to pay for connected services compared to older drivers (45 and above).

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

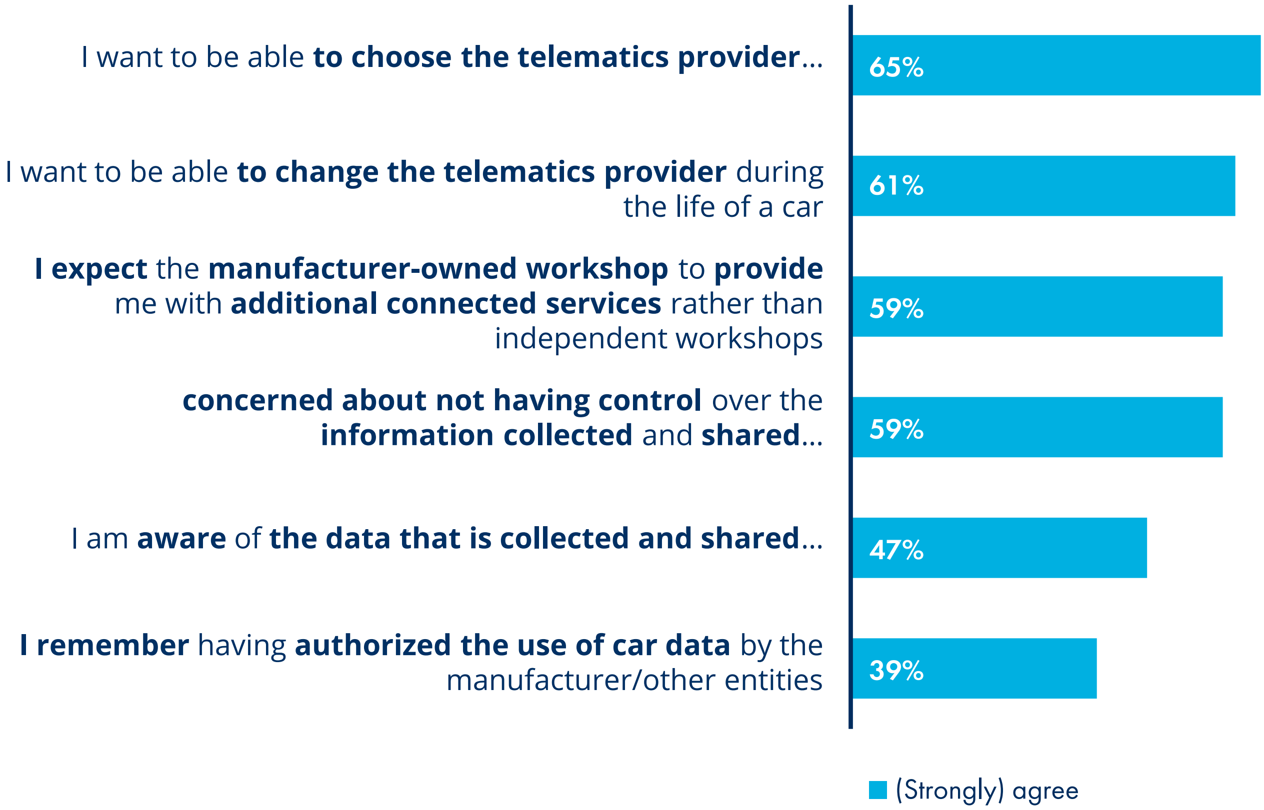
Willingness to switch the brand based on data sharing options – by willingness to pay for car apps
All respondents in %, top 2 and bottom 2 values shown



When drivers are given control with which party data gets shared, 52% are willing to consider switching car brands. The willingness to pay for car apps also is the highest within this segment, at 72%.

CONSUMER CHOICE REMAINS KEY

How far do you agree with the following statements?

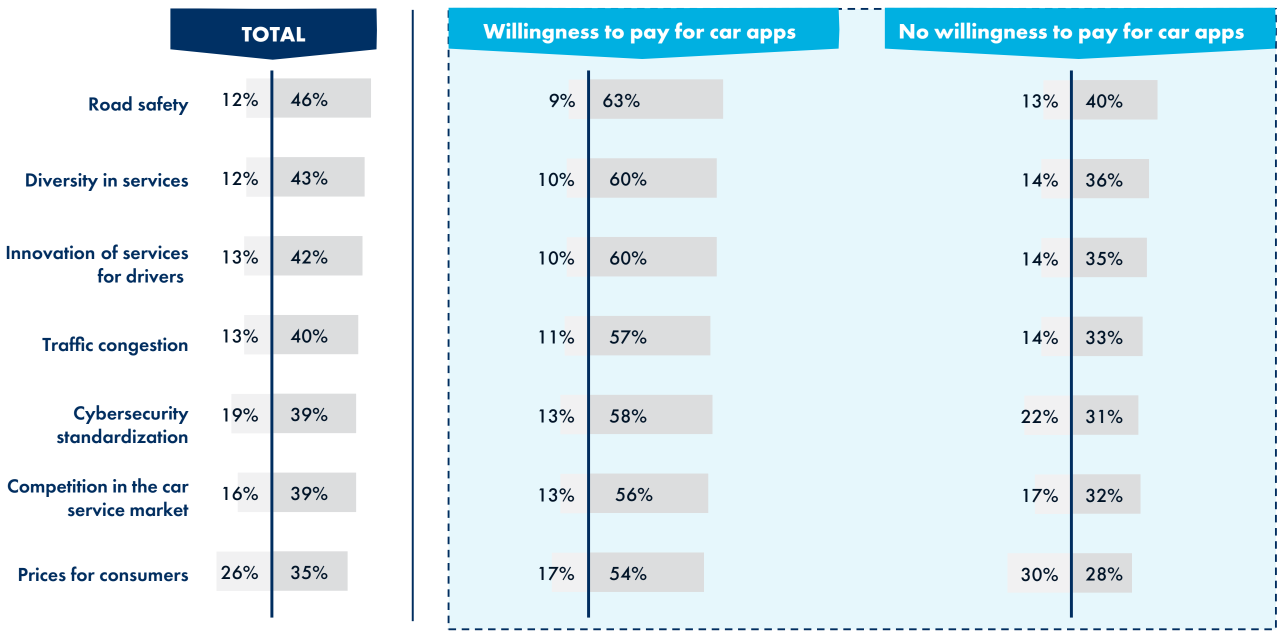


Consumer choice matters to drivers. 65% of drivers want to be able to choose their telematics provider and 61% want to be able to change the telematics provider during the life of a car. A vehicle telematics system is the device that collects data inside a vehicle, this data can include driving behaviour, accident detection, vehicle maintenance and breakdown information and other services.

CONSUMER EXPECTATION FROM SECTOR-SPECIFIC LEGISLATION

Drivers are optimistic: legislation will promote safety, diversity, and innovation – This 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



Drivers are optimistic and believe that legislation will promote safety, diversity and innovation. Drivers willing to pay for car apps have the most faith in legislation impact. As an outcome of legislation, drivers expect a wider array of services, including more innovative services and services regarding traffic congestion and road safety.

CONCLUSION

Sector-specific legislation can ensure consumer choice, fair competition and market innovation. The European Commission can support these free market values with sector-specific legislation that empowers European consumers.

This survey is complemented by an in-depth study of the economic impacts of non-action regarding sector-specific legislation, which can be found **here**.

For more information about the FIA EB's work regarding connectivity, please visit https://www.fiaregion1.com/fia/policy/.

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About FIA European Bureau

The FIA European Bureau, based in Brussels, is a consumer body comprised of 66 Mobility Clubs that represent over 39 million members from across Europe. The FIA represents the interests of our members as motorists, riders, pedestrians, and passengers. We work to ensure safe, affordable, clean, and efficient mobility for all.

Learn more at www.fiaregion1.com.