



Where to *rev up*

Global Automotive Disruption
Speedometer 2024



OC&C
Strategy consultants

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Introduction



The automotive industry is being buffeted by more forces now than at any time since cars were invented: advanced technologies, the push for sustainability, expanded regulations and (de-)globalisation, to name a few. But what often gets forgotten is the consumer, who ultimately decides what car to buy and how to manage it. And as we have seen with the latest electric-vehicle (EV) purchase trends, consumer preferences can often diverge from manufacturer and government ambitions.

Today's consumers aren't moving as fast as the hype is. They're open to new propositions, but increasingly know what they want - and affordability plays a key role. Successful businesses will meet consumers where they are rather than trying to lead them by the nose.

In the 2024 Speedometer, we share more detailed findings and insights on the key trends and implications for the winning businesses of the future, highlighting where to rev up investments – and where to reverse.

In This Report

Functional, not fun.

Consumers still want their own car, but cars have become an increasingly functional purchase – driven by need and cost, not status.



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Physical is the new digital.

The online shopping that took off during the pandemic has waned, giving way to an omnichannel approach which acknowledges consumer preferences and the inherently physical nature of car sales and servicing. Traditional dealers are best placed to succeed, but those that best integrate learnings from digital retail will be the winners.



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Subscription motoring is stalled.

Consumers want to spread out the cost and risk of ownership for new and used cars – but suppliers haven't cracked the subscription proposition at a price consumers find palatable.



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Cars are connected - but consumers are just starting to log on.

OEMs have every incentive to create apps that provide avenues for post-sale engagement, and they have built the features to do so. With one-third of owners using car apps, there's an audience ready to reach and headroom for more users.



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EV adoption is being held back by perception, not reality.

Consumers have growing concerns about cost, range and charging infrastructure, but many of these are driven by inaccurate perceptions. Industry and especially governments have much educating to do.



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China's car owners think different - but this might be industry immaturity as much as a crystal ball for the West.

Chinese automotive consumers are significantly more interested in online car purchases, EVs and subscription models than consumers in other countries. But in China, car owners are young, urban and wealthy, and the young car parc means the factors that support more traditional purchase patterns are only now developing.



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Functional, *not fun*



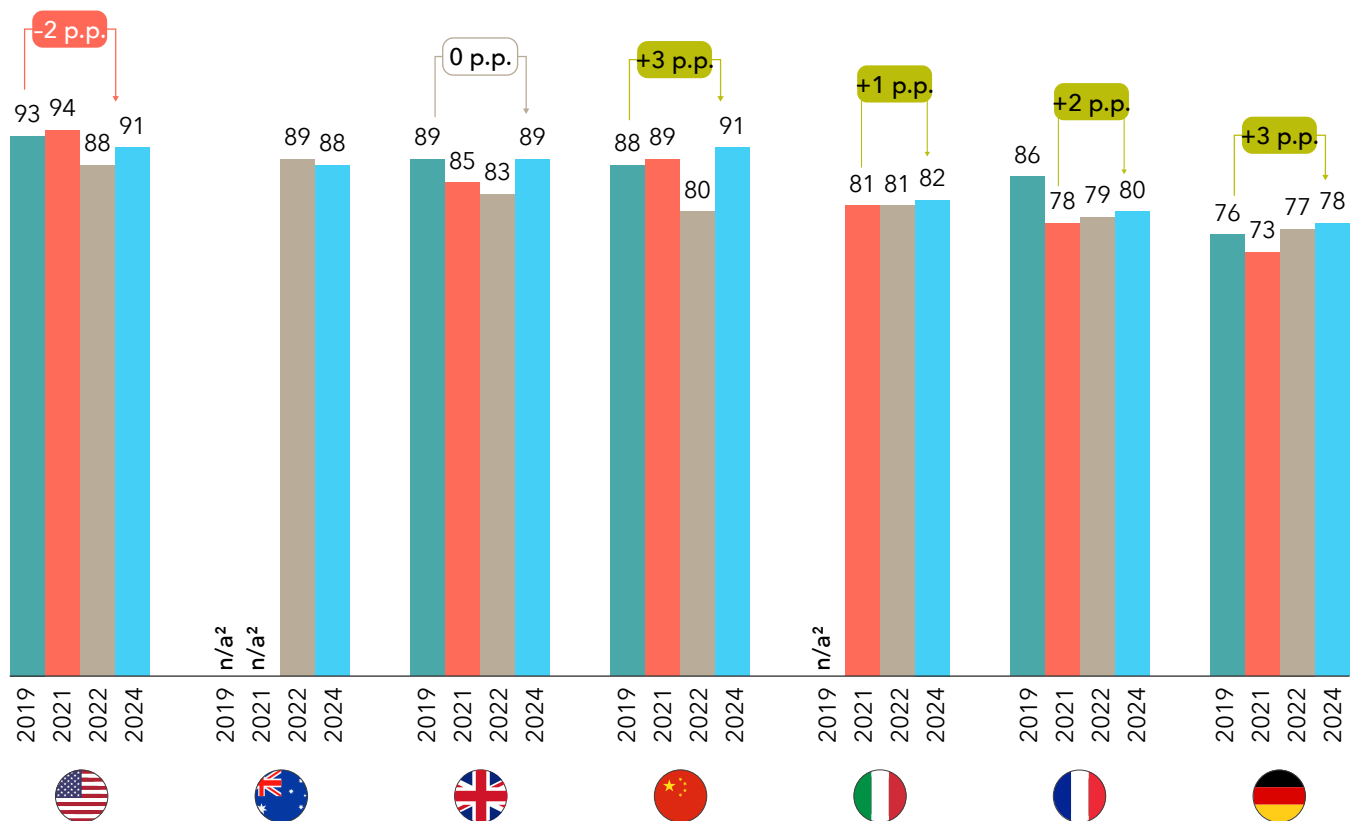
People still want cars

Conversations about shared mobility and robotaxis have been swirling for years, but as we predicted in earlier reports, the hype exceeds the reality and consumers still want their own cars. This remains true even in the face of economic change over the past four years. While car buying behaviors and attitudes have shifted, consumers view car ownership as essential.

CAR OWNERSHIP IS HOLDING STEADY

Importance of car ownership over time by country¹

(% of respondents agreeing/strongly agreeing)



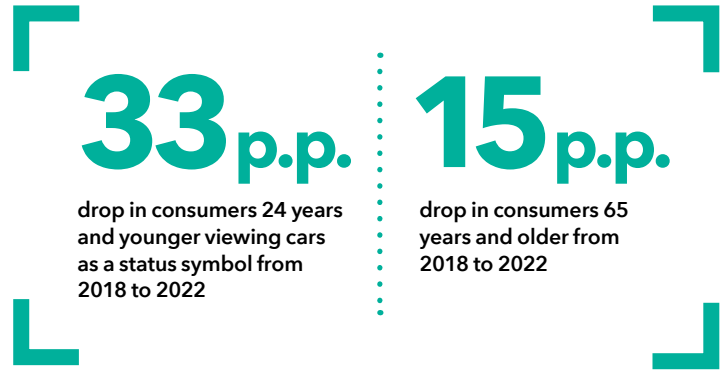
1. Q43: To what extent would you agree with the following, where 1 = disagree and 5 = agree: Having your own car is essential to getting around? Reflects only respondents who drive.

2. No historical data available.

Source: Speedometer Survey 2019-24, OC&C analysis.

Ownership is becoming more functional and less emotional

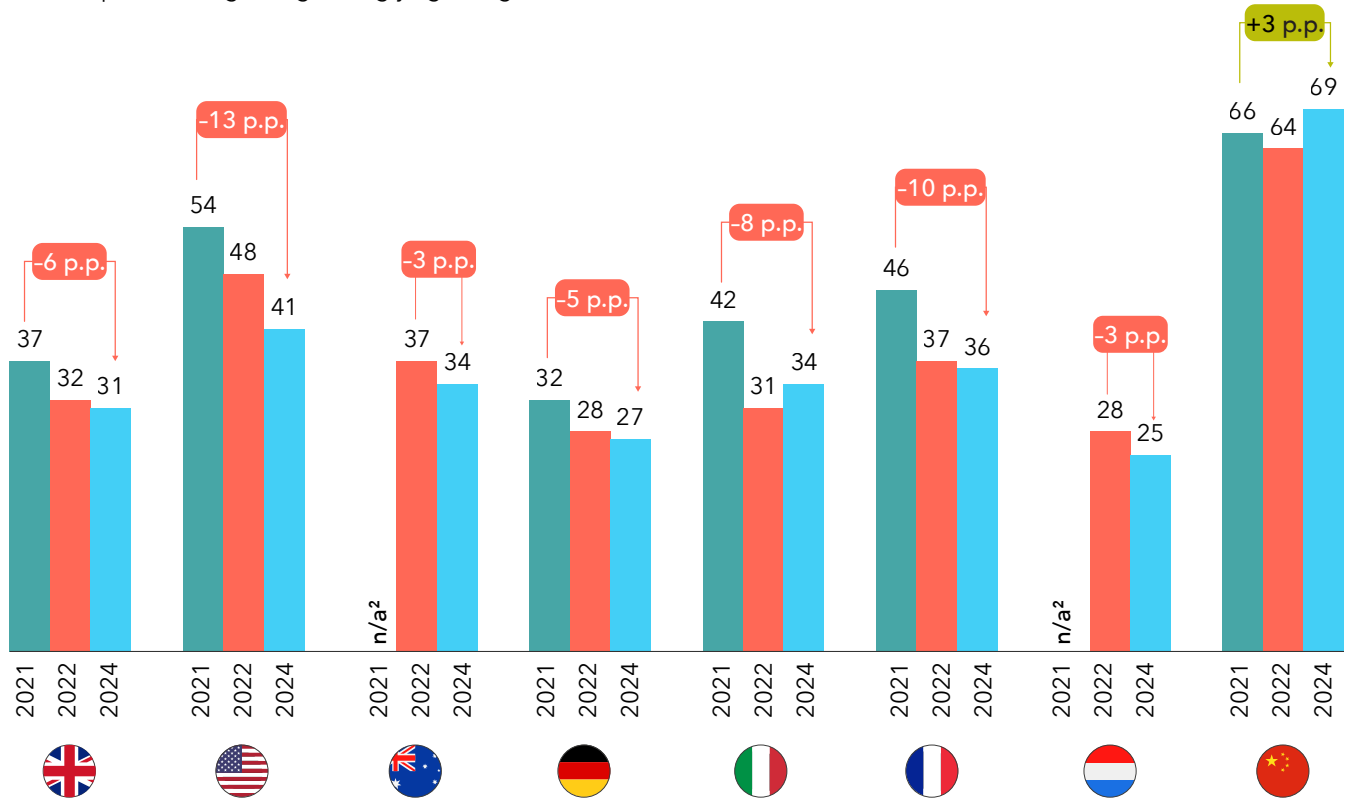
A more notable shift is seen in today's consumer attitudes toward cars. Drivers are less likely to view cars as status symbols, especially in countries with the strongest historical devotion (in the US, those who agree a car is an important status symbol has dropped from 54% in 2021 to 41% today), and particularly so among younger demographics. One region diverges significantly from this trend: China, where consumers do still see cars as status symbols. Chinese consumer preferences diverge from other regions on a number of dimensions, as we discuss later in the report.



CARS AREN'T THE STATUS SYMBOLS THEY USED TO BE

Importance of car as a status symbol over time by country¹

(% of respondents agreeing/strongly agreeing)



1. Q43R8: To what extent would you agree with the following, where 1 = disagree and 5 = agree: A car is an important status symbol.

2. No historical data available.

Source: Speedometer Survey 2021-24, OC&C analysis.

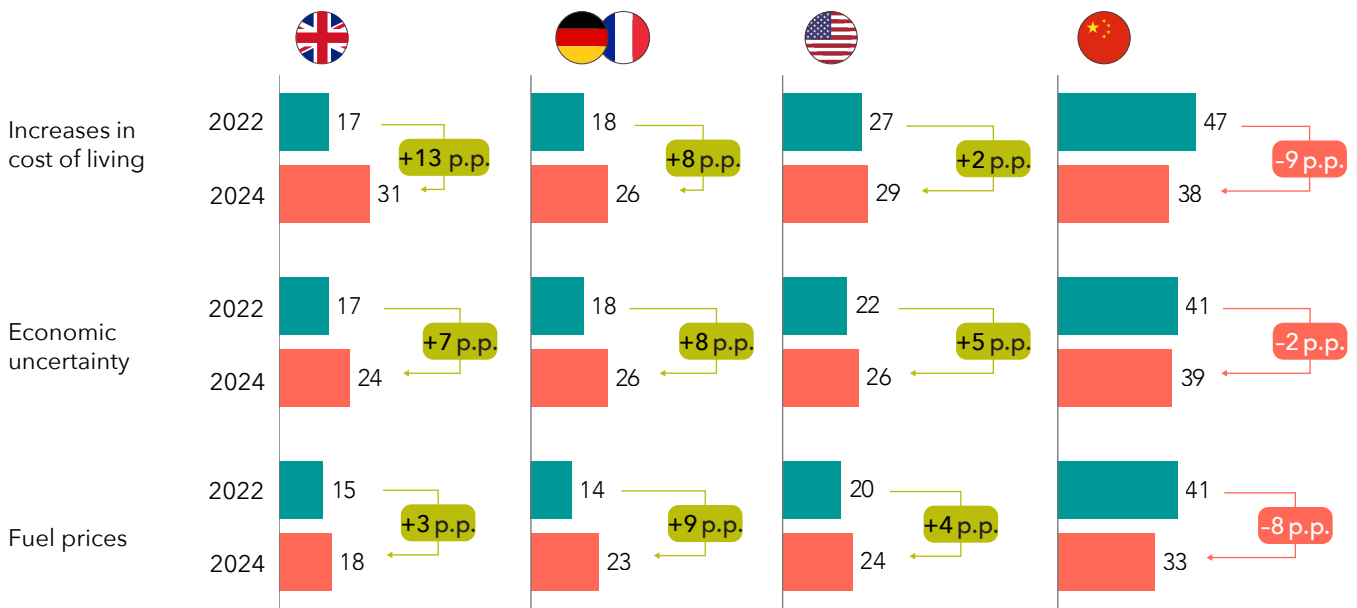
Consumers are delaying purchases in the cost-of-living crisis and buying on monthly budgets

While car ownership remains essential for many consumers, they're still feeling the pressure of cost of living increases and economic uncertainty. That pressure is delaying car purchases.

ECONOMIC PRESSURES ARE PUSHING CONSUMERS TO HIT THE BRAKES

Impact of economic pressures on timing of current car purchase¹

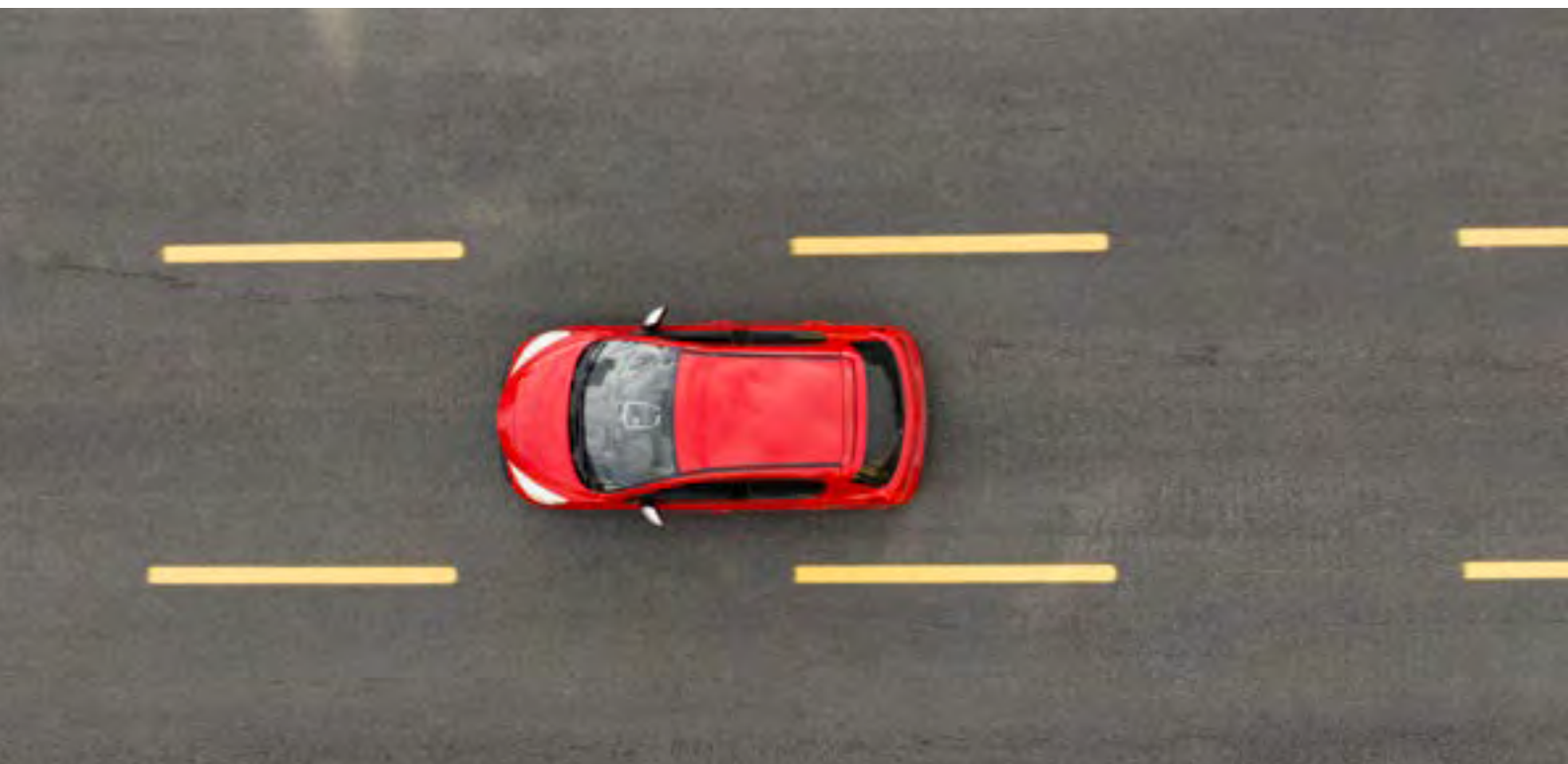
(% of respondents reporting a slowing of decision to purchase due to factors named below)



Note: For France and Germany, percentages were calculated by grouping regions together because responses were consistent with one another. Figures may not sum due to rounding.

1. Q17BR: Did the following market changes impact your decision on when to get your current car?

Source: Speedometer Survey 2022-24, OC&C analysis.





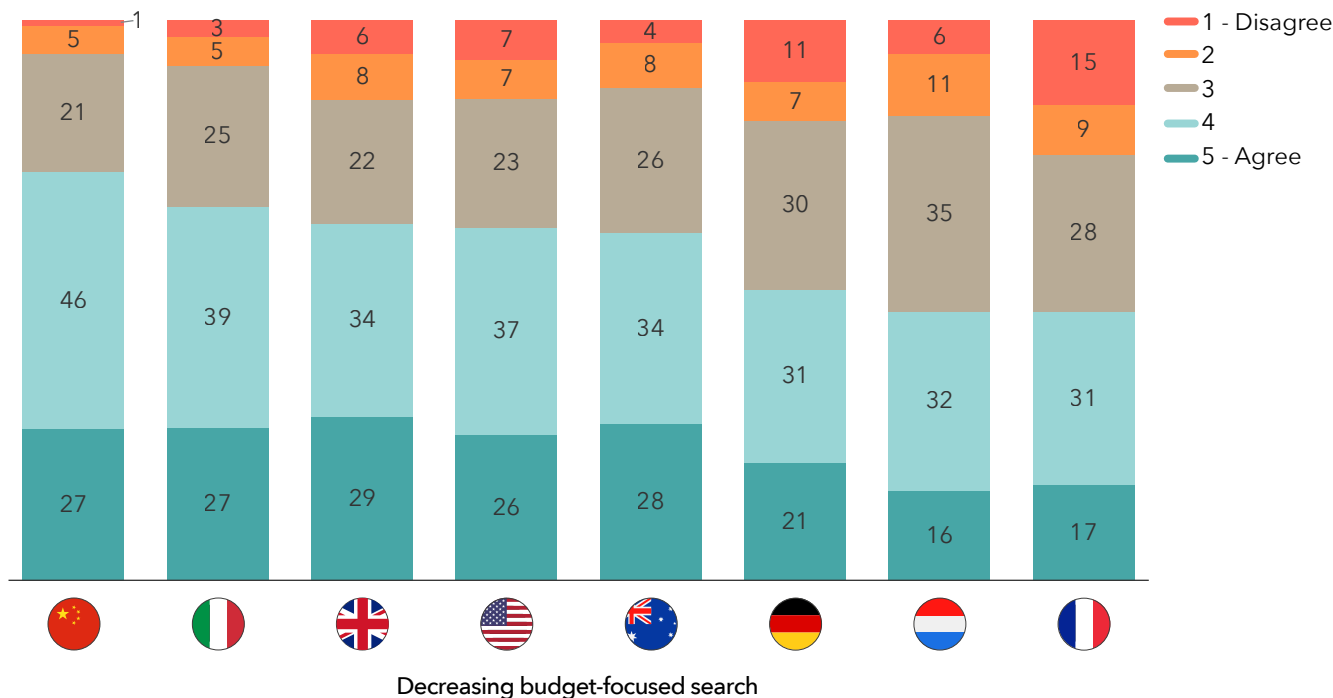
The car purchase budget is increasingly based on total monthly spend versus a straight purchase price.

When consumers do buy, they think about budget first, not the make or model of car.

BUDGET IS THE DECIDING FACTOR FOR CONSUMERS ON THE HUNT FOR A CAR

Consumers beginning searches from a budget lens¹

(% of respondents)



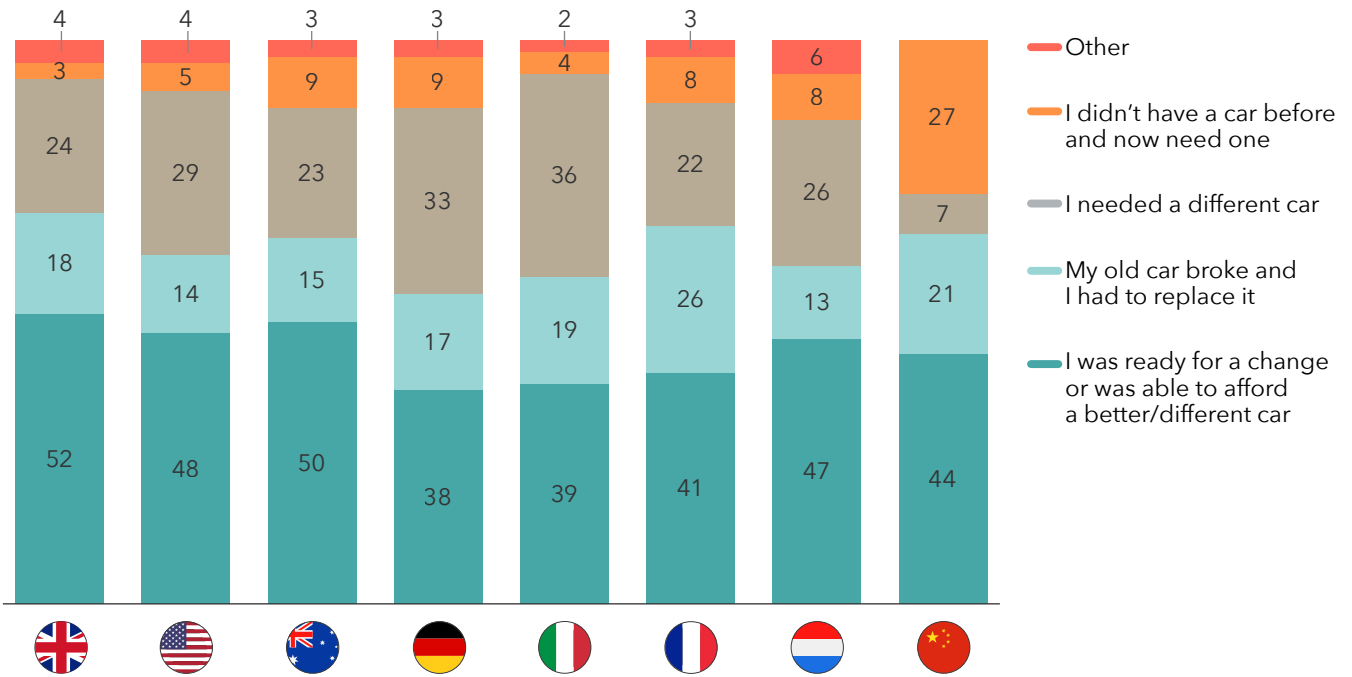
1. Q43: To what extent would you agree with the following, where 1 = disagree and 5 = agree? I start my search for a car by working out the budget I can afford rather than searching for a specific car. Reflects only respondents who drive.

Source: Speedometer Survey 2024, OC&C analysis.

In the current environment, transactions are increasingly driven by need versus want, though this varies by geography. In the UK, US and Australia, half of vehicle purchases are discretionary, while in Germany, two-thirds are driven by need.

WANT OR NEED? REASONS FOR BUYING A VEHICLE ARE MIXED

(% of respondents)



1. Q17C: What was the main reason to change your car at that point? Reflects only respondents with recent vehicle transaction. Source: Speedometer Survey 2024, OC&C analysis.

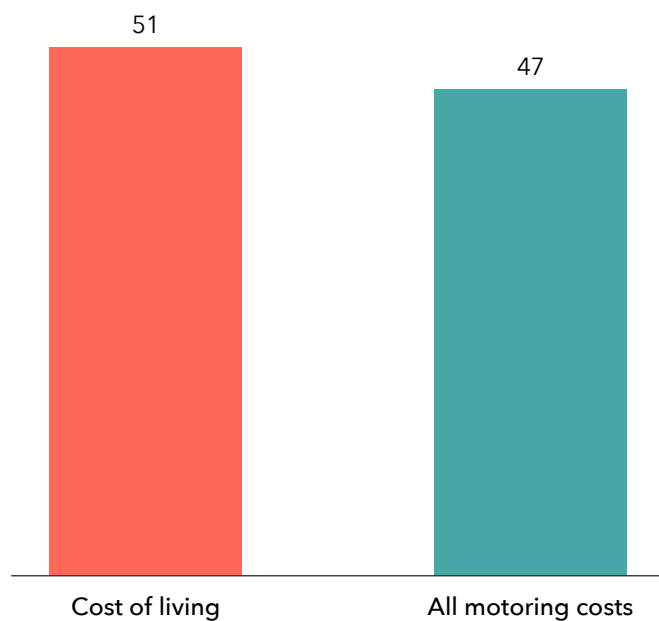




Despite the headlines, motoring remains relatively affordable

MOTORING COSTS TRACK BELOW COST OF LIVING

UK cost of motoring vs cost of living
(% increase)



Source: RAC, OC&C analysis (2014-24 data).

In many countries, the all-in cost of motoring has actually declined in real terms over the past decade.

For example, the UK has experienced 51% cumulative general inflation and a 47% increase in motoring costs since 2014 - in line with average wages, which also rose by 47%. Insurance has increased markedly in real terms, but cost of the vehicle itself and fuel have tracked far below inflation in the UK.

Subscription motoring is *stalled*

Enthusiasm for fractional motoring is low and often declining

Fractional ownership models (for example, rental, car clubs, or Uber) could hold promise for drivers, but consumer interest is stagnating or declining. This doesn't necessarily mean consumers aren't open to new models, but providers haven't yet developed a compelling consumer offering that also makes the economics work for them.



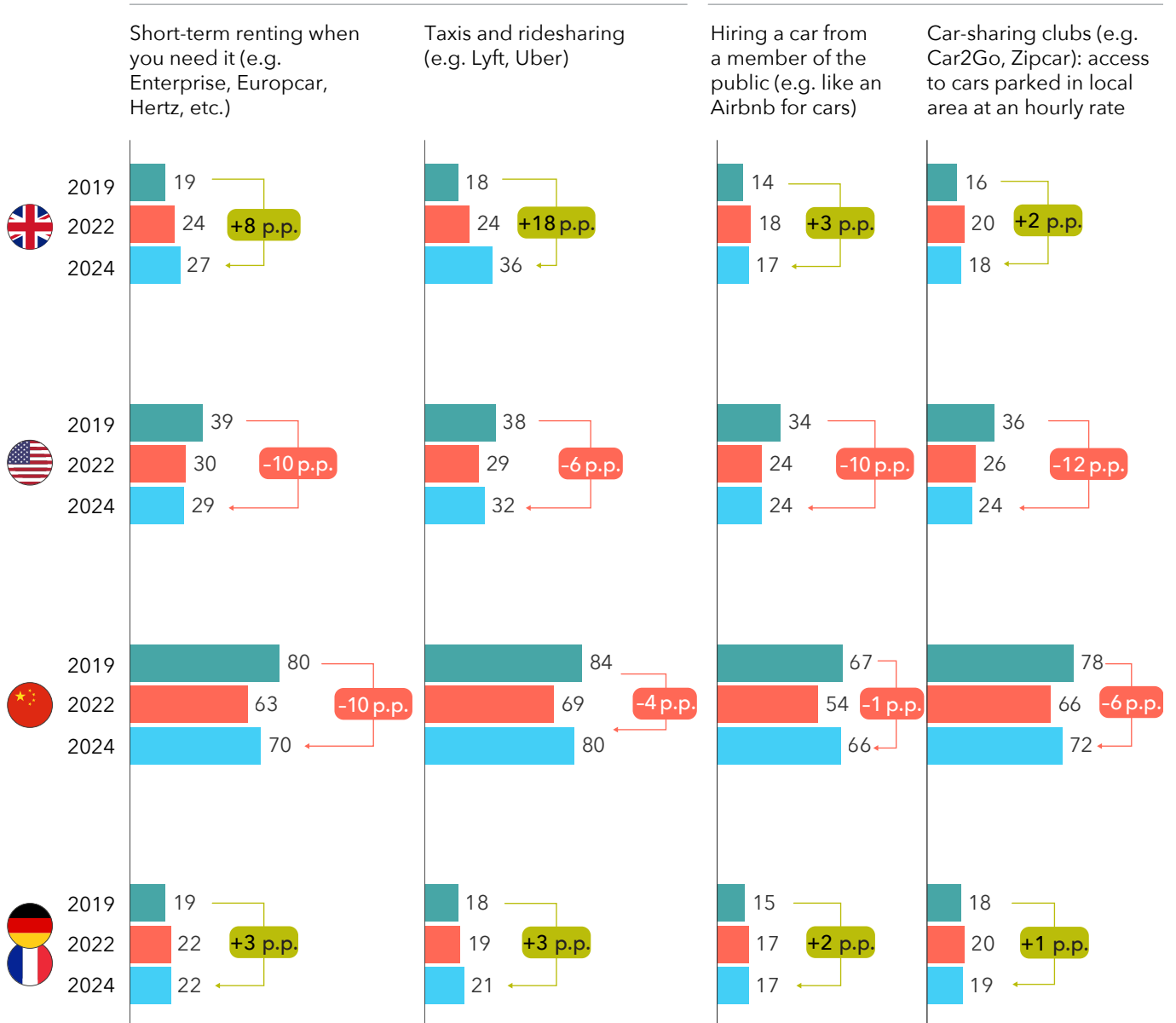
OUTSIDE OF THE UK, INTEREST IN ALTERNATIVE OWNERSHIP MODELS IS FLAT OR FALLING

Consideration for future ownership alternatives¹

(% of respondents who would consider an alternative in addition to/instead of owning)

Short-term rentals and taxis are failing to grow outside of the UK . . .

. . . while consideration for other alternatives is stagnating



Note: For France and Germany, percentages were calculated by grouping regions together because responses were consistent with one another. Figures may not sum due to rounding.

1. Q30: Next time you swap your vehicle, would you consider any of the following alternatives to having your own vehicle?

Source: Speedometer Survey 2019-24, OC&C analysis.

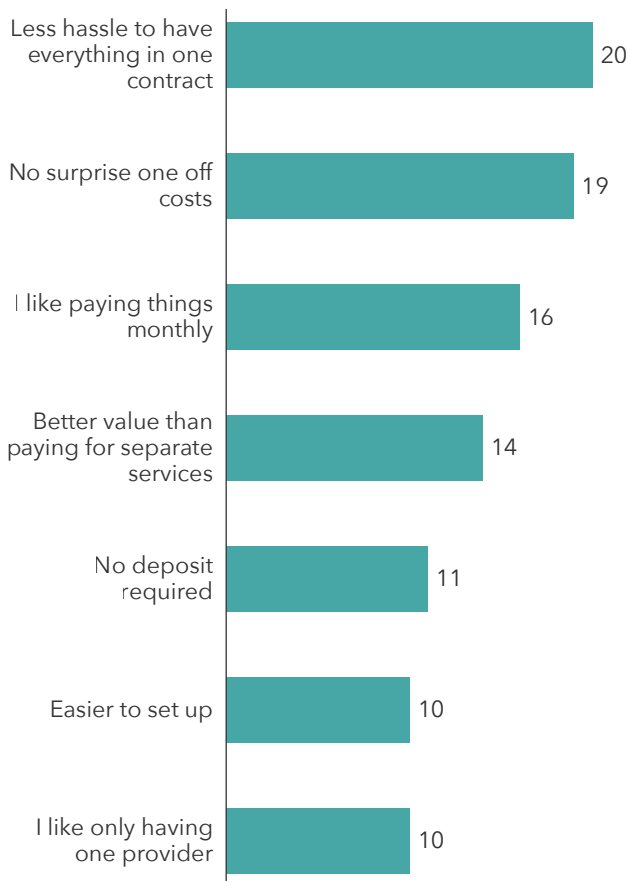
Consumers want to spread out the cost of ownership, but suppliers haven't profitably cracked the code

One in three drivers reported that a monthly 'subscription' is attractive because it would involve less hassle, no surprise costs and stable monthly payments. For 80% of consumers, those benefits are more important than the ability to swap cars. So the traditional view of a 'subscription' being about flexibility is wrong - it is attractive because of its simplicity and stability.

EASE AND COST VISIBILITY ARE WHAT MATTER FOR CAR SUBSCRIPTION CUSTOMERS

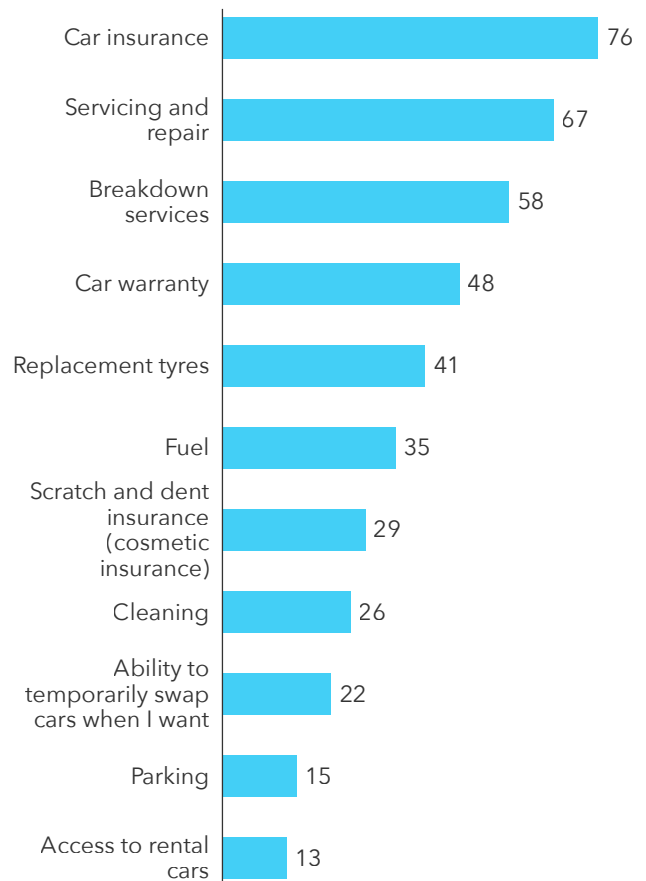
Attractive features of a monthly car subscription vs current setup¹

(% of all global respondents)



Services expected in a monthly car subscription²

(% of all global respondents)



1. Q34A: You said you would consider a monthly subscription to the vehicle of your choice. What makes this attractive versus your current setup?

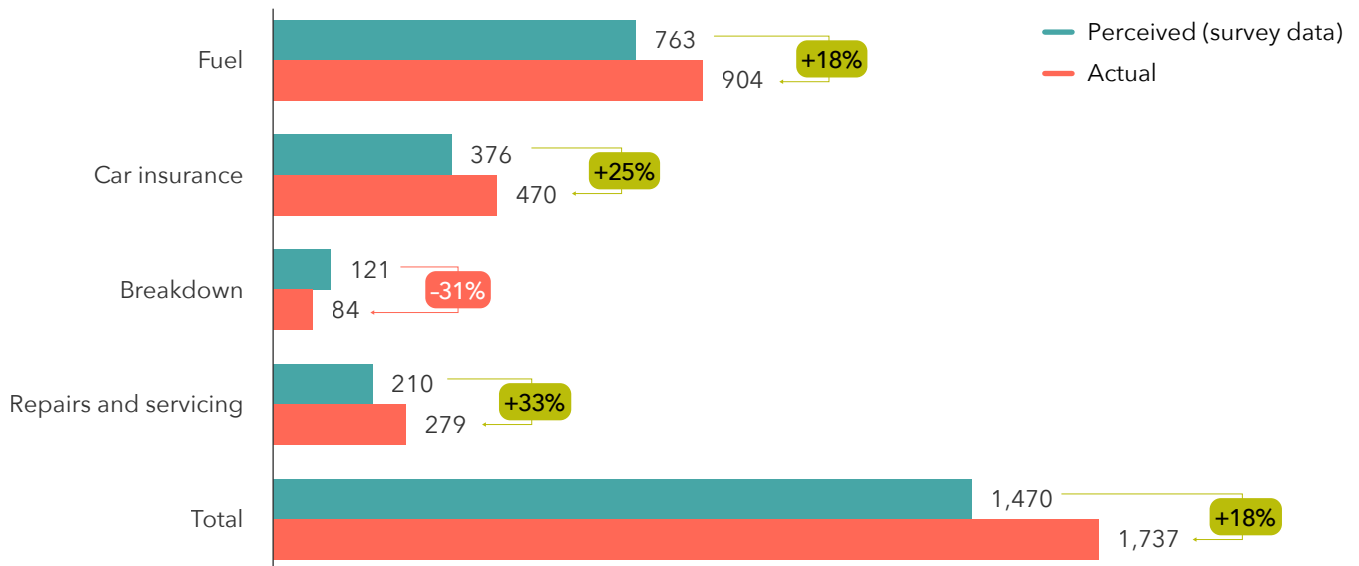
2. Q32: If you paid for a car with a monthly payment, which of the following vehicle services would you ideally like to be able to include?

Source: Speedometer Survey 2024, OC&C analysis.

Bringing vehicle services and costs together in one transparent package can provide ease and cost visibility for the consumer, but one challenge remains: sticker shock. Because consumers consistently underestimate their spending on many aspects of motoring, they would see an all-inclusive subscription as a more expensive option that doesn't seem to provide good value. In the UK, for example, consumers underestimated their total motoring spend by around 18%.

UK DRIVERS ARE SPENDING MORE ON FUEL, INSURANCE, AND REPAIRS AND SERVICING THAN THEY THINK

Perceived vs actual consumer spend on auto services (£)



Note: Reflects only respondents who drive.
Source: Speedometer Survey 2021, OC&C analysis.

The main, and really only, barrier to subscriptions is sticker shock – consumers consistently underestimate their spending on many aspects of motoring, so a monthly bundle that makes it all transparent doesn't seem like good value.



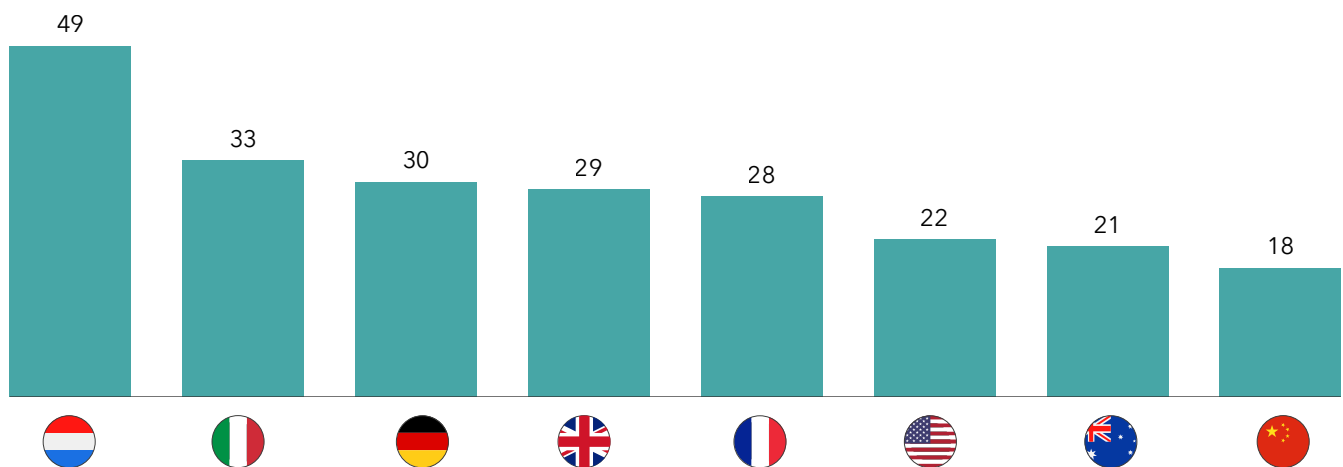
Used leasing has latent opportunity

There is significant unmet demand in leasing, with more than a quarter of used-car owners (and up to half in the Netherlands) keen to lease a used car. Longer-lasting vehicles and increasingly sophisticated residual value pricing are paving the path forward.

DEMAND FOR USED-CAR LEASING IS REVVING UP

Open to used-car leasing

(% of used-car buyers open to leasing)¹



1. Q43: To what extent would you agree with the following, where 1 = disagree and 5 = agree? It's much better to fully own your car than to have it on a lease. Reflects only respondents who drive.

Source: Speedometer Survey 2024, OC&C analysis.

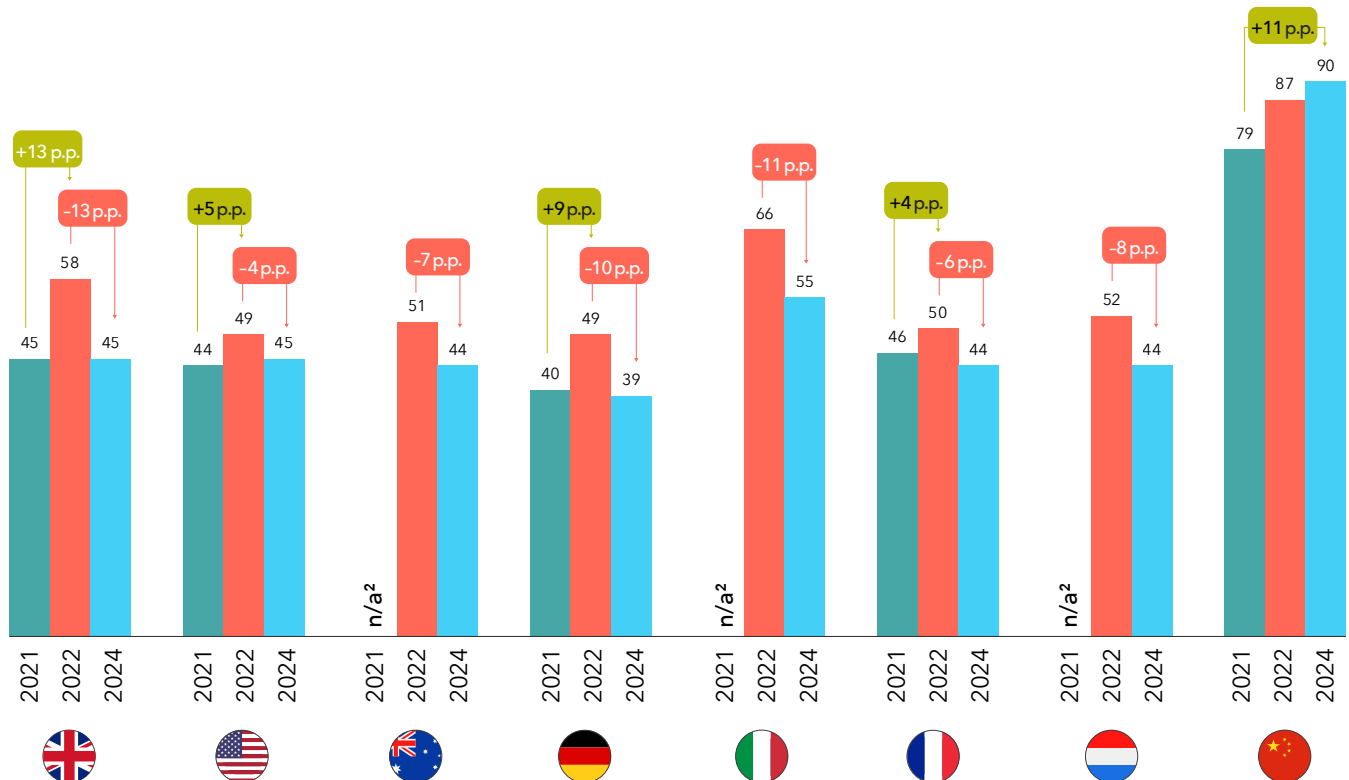
EV adoption is being held back by perception, not reality

Enthusiasm for EVs is in decline

Governments have ambitious EV adoption targets, but consumer ambivalence and lingering concerns about cost and driving range stand in the way. Our research shows that, over the past several years, fewer consumers are considering EVs in every region except China.¹

EV PURCHASE CONSIDERATION IS DIMINISHING EVERYWHERE BUT CHINA

Consideration of fully electric vehicles on next purchase¹ (%)



Note: Figures may not sum due to rounding.

1. Q28: When considering your next car, how likely are you to consider an Electric/Hybrid vehicle? Respondents definitely buying an EV, likely to buy one, or considering buying one.

2. No historical data.

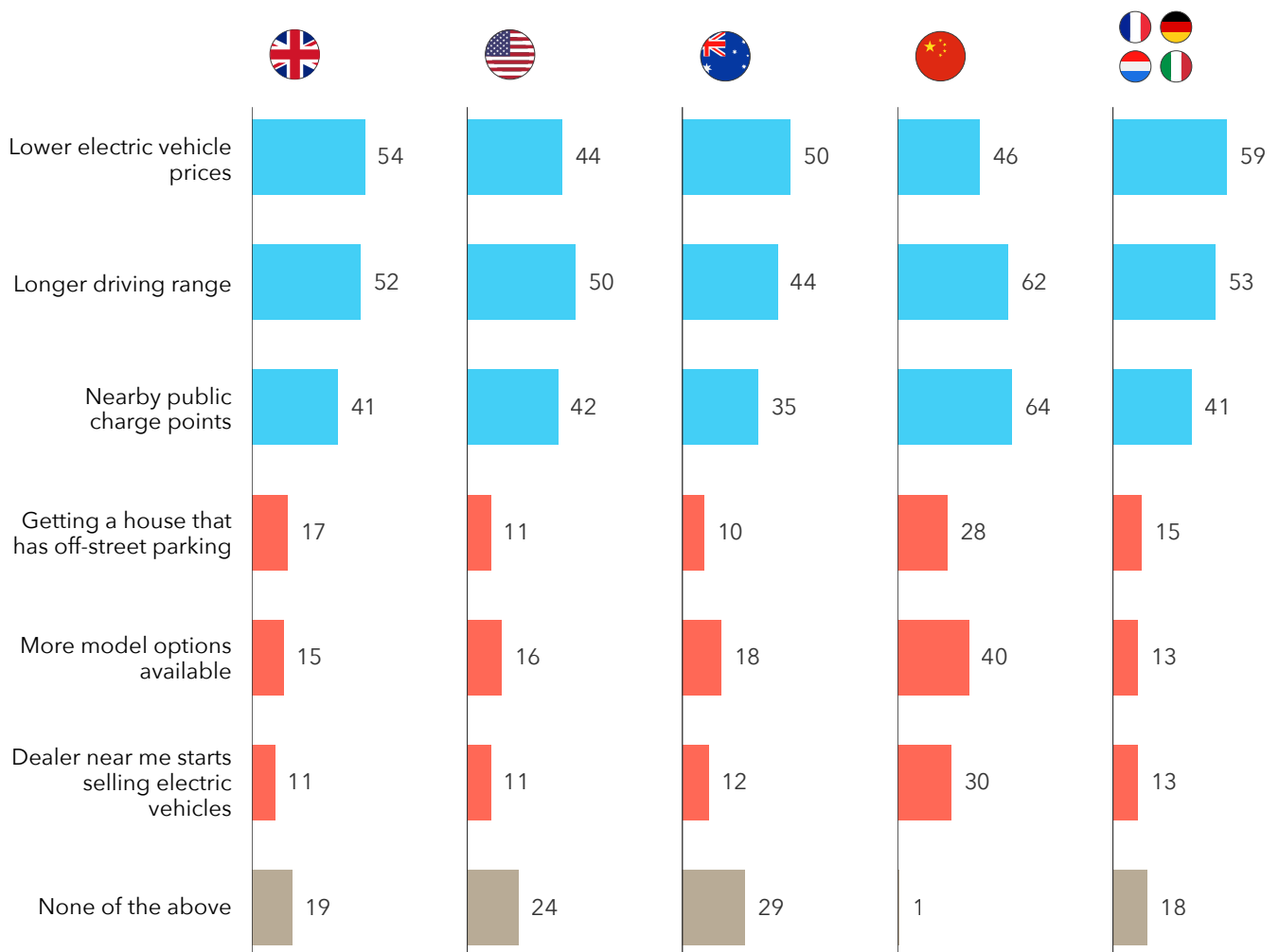
Source: Speedometer Survey 2021-24, OC&C analysis.

Only 47% of drivers agree they'll have an EV eventually; this has dropped from 51% in 2022.

In addition to cost to purchase and driving range (the top two concerns in every geography except China), drivers are concerned about the cost of electricity and access to charging stations. Addressing these concerns could convince them to purchase an EV. The unlocks for consumers are lower vehicle prices, longer driving range and public charge points.

LOWER PRICES, LONGER RANGE, MORE CHARGING POINTS: THE MUSTS FOR EV ADOPTION

Factors that would encourage respondents to purchase an electric vehicle as their next car¹
 (% of respondents selecting factor)



Note: For France, Germany, Italy, and the Netherlands, percentages were calculated by grouping regions together because responses were consistent with one another.

1. Q29B: What would it take for you to purchase an electric vehicle as your next car? Reflects only respondents who drive.

Source: Speedometer Survey 2024, OC&C analysis.

EV barriers are more perception than reality

Many of the barriers to EV uptake have been addressed, so at the heart of the issue are perception problems that providers will have to combat.

Price: Perception



At the end of 2023, the price gap between EVs and internal combustion engine (ICE) vehicles in the US had narrowed to \$2,100 (\$50,800 for EV versus \$48,700 for ICE); at the start of 2019, the difference was almost \$30,000. And as OEMs engineer out costs and drive more EV sales to hit government emission-reduction targets, EVs will become cheaper on a like-for-like basis than ICE vehicles.

New Chinese EV models are also undercutting Western brands on price by 10-20%, with potential to cut further. Consumers are likely to respond: 32% reported they are already happy to buy from a Chinese manufacturer, and a £2,000 discount would be enough to persuade a further 15-20% of UK buyers (or a significant 33% in the US) to make the switch.

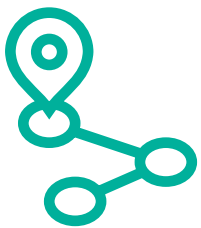
	Starting Retail in China	Starting Retail in EU and UK
2024 Byd Dolphin	€12,800	€28,990
2024 VW Id.3	€21,195	€29,760

Source: Car News China, Beev, Car Wow, Shop4EV

The wrinkle in this story is residual values: lack of stability in used EV prices and sharp depreciation curves are driving higher leasing/finance costs versus ICE vehicles. But two factors are likely to address this (tariffs notwithstanding): first, Chinese OEMs should still be able to deliver a lower-priced option; second, European OEMs will be forced to react with their own lower-cost EV models as regulation pushes them to grow EV registrations.

Prices for used EVs are also closing the gap with ICE vehicles: used-vehicle values fell by 6.8% overall year over year, but values for EVs fell by 20%.

Source: Industry Insights 2024 Webcast, Cox Automotive, January 8, 2024.



Range: Perception

In our survey, 85% of global EV drivers did not find range to be an issue. And most drivers aren't traveling hundreds of miles by car: 55% of customers haven't done a single journey greater than 300 miles in the past year. EV range is improving rapidly, increasing from a median range of 234 miles in 2022 to 270 miles in 2023. Communicating this more clearly to potential buyers can tackle the perception that range is problematic.



Charging: Reality

Drivers pointed to the lack of charging points, long charging times, broken charge points and paying for charging as major pain points. This is an issue in all geographies, but it is particularly acute in the UK, Australia and China.



EV drivers are happy - and there could be more of them

EV early adopters are happy with their vehicles, and this is true across demographics with an NPS of 27-71 across age and income groups.

EV owners are particularly positive about driving experience, feel-good factor, and cost savings on fuel and road tax/congestion charges.



EV Ownership NPS by Geography, 2024
How likely would you be to recommend having an EV to your friends?
Source: Speedometer Survey 2024, OC&C analysis.

Drivers only/EV owners

87%

of EV owners globally see the driving experience as having a positive impact

82%

feel some or strong positive impact on contribution to the environment

Rather than invest in subsidies for EV purchases, especially as sticker prices become more affordable, governments should direct their resources to better charging infrastructure and education. Communicating more effectively about EV barriers - price and range - and the promise of better infrastructure can be a turnaround point for EV adoption.



Physical is the *new digital*

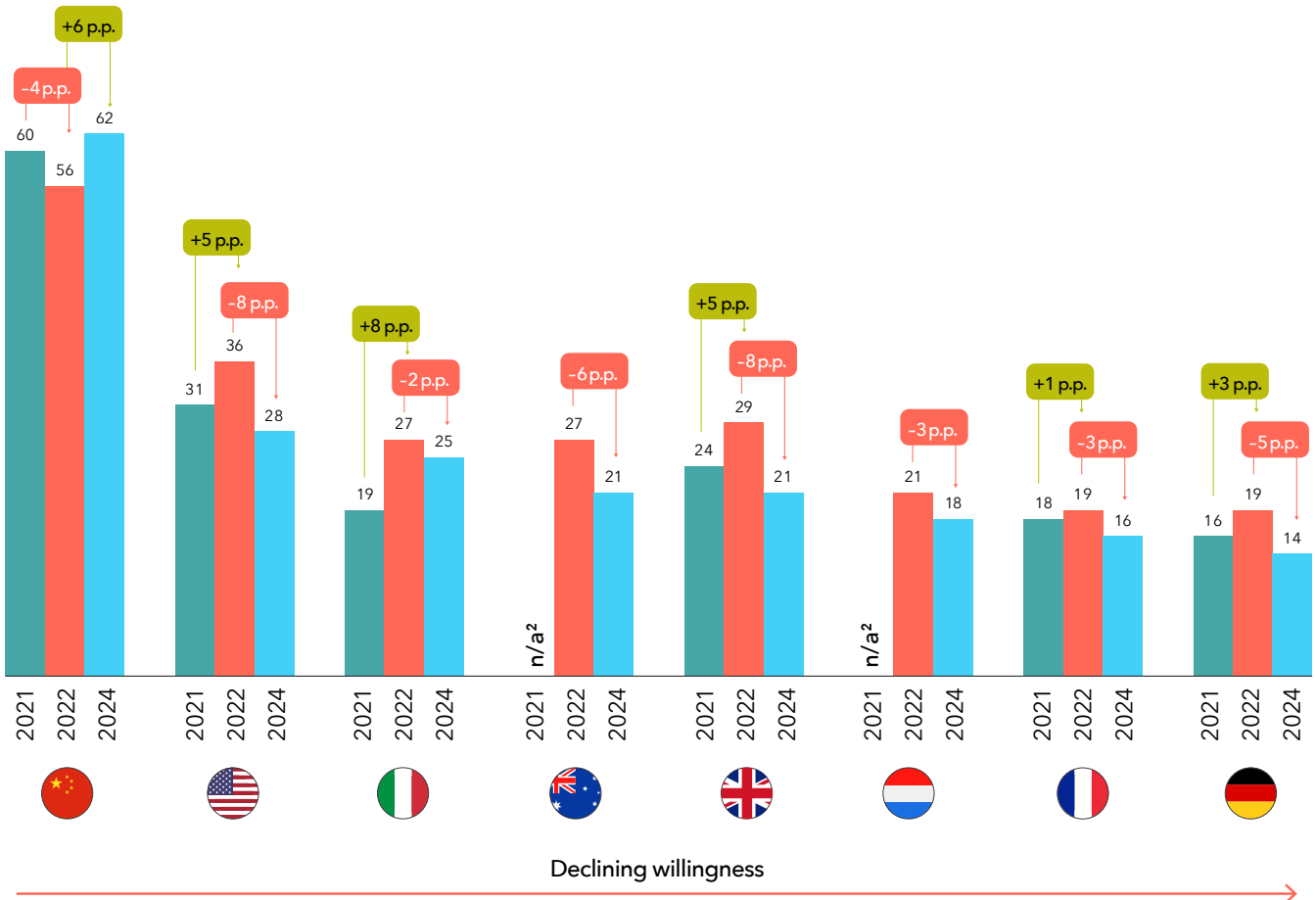
Consumer willingness to transact online has plateaued, but there's significant room to enable more digitally

Today's consumers expect seamless purchase experiences in everything from drugstores to big-ticket items - including cars. Convenience and efficiency are table stakes. But in automotive, the hype of online car shopping has given way to the reality of the physicality of cars. The growing appetite for 'fully online' purchases or 'click and collect' has dropped or stabilised in all geographies except China.

FEWER BUYERS WILLING TO 'CLICK AND COLLECT' - IN ALL COUNTRIES OUTSIDE OF CHINA

Willingness to purchase a car using 'click and collect'¹

(% of respondents citing as Agree/Strongly Agree on being happy to purchase a car on 'click and collect')



1. Q43R8: To what extent would you agree with the following, where 1 = disagree and 5 = agree - I would be happy to purchase my next car on 'click and collect' or home delivery - without seeing it first.

2. No historical data.

Source: Speedometer Survey 2021-24, OC&C analysis.

'Consumers value the physical car-purchase experience, but digital has opportunity.'

This is not to say there is no room for growth in online sales: some groups are still keen on the online car-buying experience. Interest is significantly higher than the reality of consumers transacting online (estimated at less than 5%), suggesting that there is opportunity with the right consumers.

Online transaction opportunities will be easiest with certain drivers: younger drivers, EV owners, and those considering Chinese brands.

YOUNGER DRIVERS:

61%

of drivers aged 35-44 may consider online car purchase

EV OWNERS AND THOSE WHO WILL PURCHASE AN EV:

27%

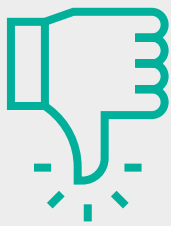
of EV owners are likely to purchase online

THOSE CONSIDERING CHINESE BRANDS:

21%

of drivers aged 35-44 would definitely consider Chinese brands

Online purchase appetite may rise again. This is especially true given that half the reasons for not transacting fully online are solvable. They include:



Thinking stock and pricing online aren't as good



Not knowing fully online is an option



Wanting to part-exchange an existing car – as demonstrated by the rise in car buying services

Dealers with an integrated digital journey from online to in-store will be the winners

For consumers who are willing to transact fully online, they want to do it with ... a dealer!

Although there is also appetite for purchasing new cars directly from OEMs (often with the expectation of dealer facilitation), dealers' own websites would be the most popular place to buy 'fully online'.

ONLY 11%
of respondents (excluding China) would definitely consider buying a car online from Amazon in 2024

	Would definitely consider	Might consider, depending on who they were partnered with	Would not consider
A franchise dealer (approved by the manufacturer)	27%	46%	28%
Car manufacturer (e.g. Ford, Honda, BMW)	26%	44%	30%
An independent dealer	20%	48%	32%
A car supermarket	16%	40%	44%
A roadside assistance company	15%	35%	50%
An insurance company	15%	34%	51%
A car review website (e.g. Autoweek)	14%	38%	49%
A car leasing company (e.g. Alphabet)	13%	34%	53%
Amazon	11%	25%	64%

Note: Data excludes China.

The mainstream consumer is seeking a seamless journey online and offline. Who will win both 'pure online' or in a more omnichannel world will depend on who can meet the consumer's need for ease and maintain profitability.

'Traditional' dealers have significant advantages in meeting consumer needs in both 'pure online' and omnichannel: the economics of logistics, sourcing, servicing, preparing a vehicle for sale, and marketing all favour the traditional dealer or a network of these dealers. For online players, this involves significantly more assets than originally expected. Carvana - the leading online success story - has significant dependence on physical sites, with 17 inspection and logistics centres, 56 reconditioning locations from partner ADESA, and around 15,000 employees.

Dealer advantages abound in omnichannel versus pure-play online insurgents

	Number of logistics moves for used cars	Used sourcing	Servicing revenue opportunity for used cars	Marketing costs
Traditional Dealer	0-1 Prep and retail co-located and often no move to prep if part exchange is involved	High part exchange mix	~50% attach	Low OEM brand halo exists for franchises
Online Insurgents	2-3 Multiple moves from source to prep to collection point or home delivery	High auction mix - with associated fees	~20% attach	High Large marketing spend to build trust and awareness

The need to both meet consumer preferences and make the economics work means the omnichannel model will ultimately win out. Digital will influence the research and purchase decision, and digitally-enabled in-person dealership experiences can close the sale. The physical nature of car buying will keep dealers in pole position.

The need to both meet consumer preferences and make the economics work means the omnichannel model will ultimately win out.



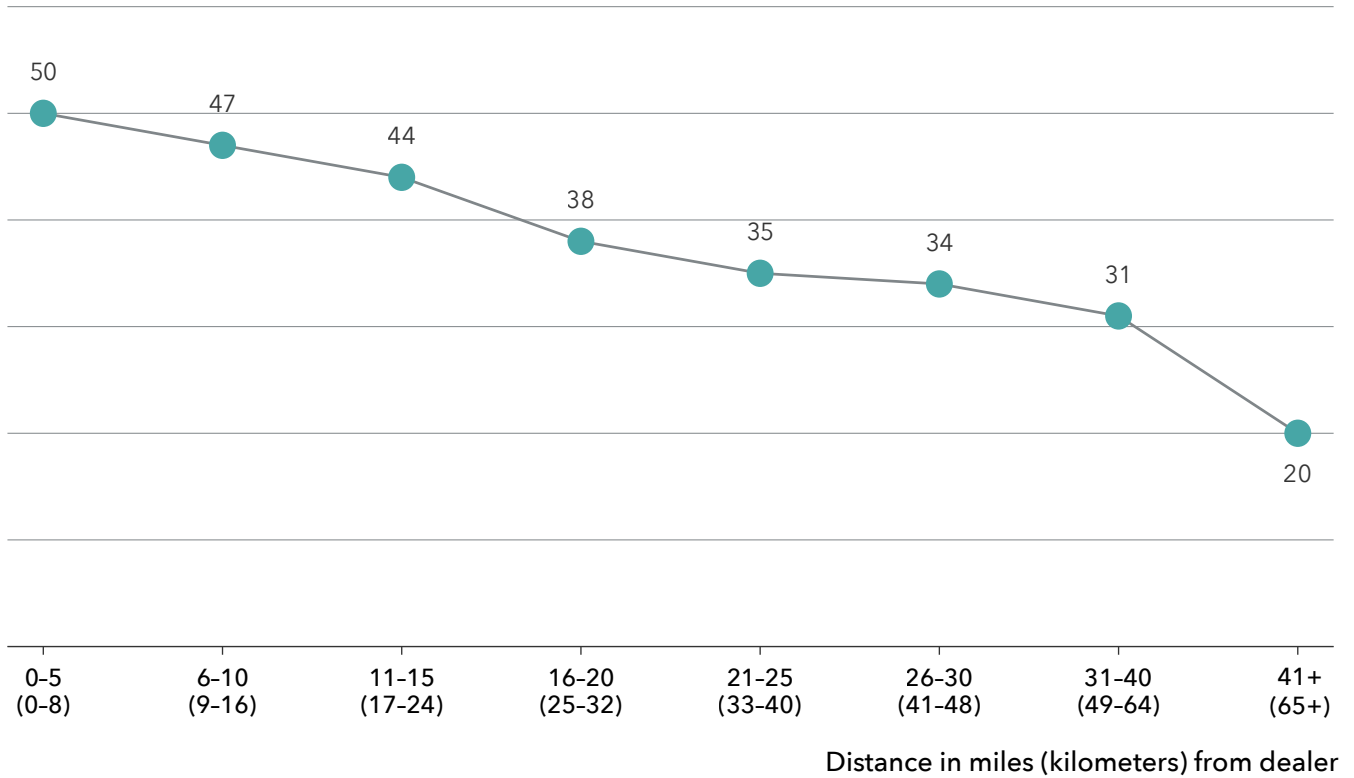
The digital consumer experience goes far beyond the car sale - spanning the entirety of their purchase experience

In considering the shift to online, it is easy to focus on the sale of the car, but the biggest impact of the transition to more digital journeys is what it means for ancillary products, both at and after the point of sale. We expect financing, part exchange, and the sale of warranties and servicing to shift significantly online - disrupting the current journey.

In our survey, 29% of UK drivers who financed their car found the finance provider online, and 43% of those who will need finance for their next car expect to find it online. The proportion who expect to do this without any chat or additional phone calls has shifted most dramatically - from 14% who did it purely online without those resources last time to 28% who expect to do it that way next time.

As distance selling increases, the question of who does the servicing is key. While 73% of drivers would pay extra for franchise-led servicing, and only 27% would always use the cheapest option, distance matters. Around half of car owners will travel up to 10 miles to their dealer for service, but less than 1 in 4 will travel 40 miles.

CARS RETURNED TO DEALER FOR SERVICE IN PAST 12 MONTHS



Source: Cox Automotive, Maintenance and Repair Study.

Mobile servicing can be the solution, with

50%

of drivers reporting they would definitely or probably use mobile servicing

60%

of those are willing to pay a premium for it

24%

would pay a premium of more than 10%

Cars are connected-
and consumers are
just starting to log on

OEM app adoption is on the rise, but there's plenty of headroom for engagement

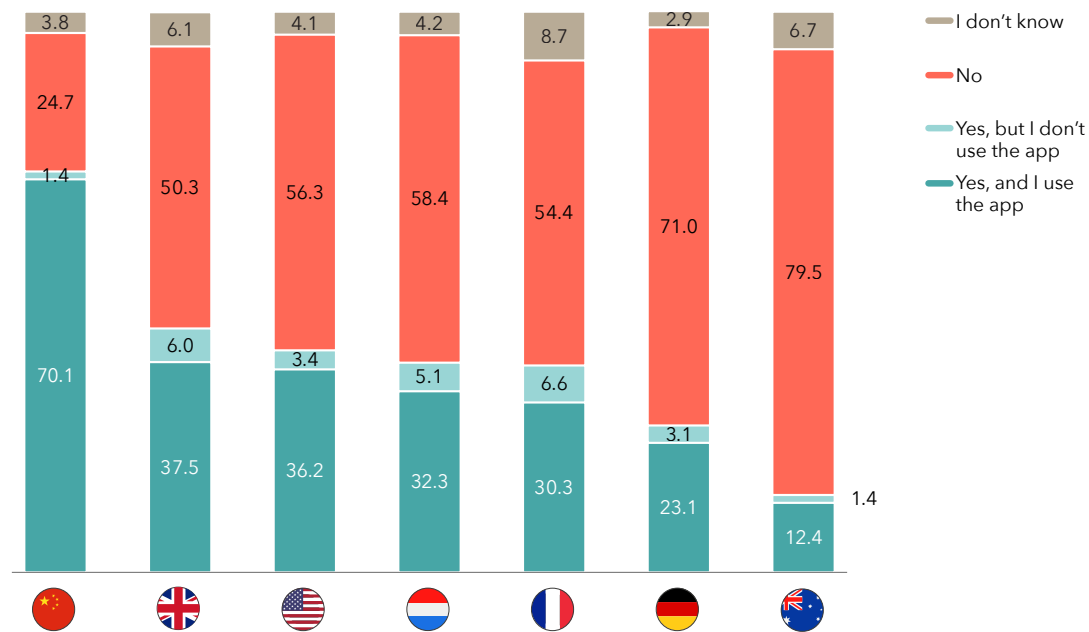
The buzz around connected cars and the idea of 'a computer on wheels' continues to build, and consumer adoption of OEM apps has increased significantly. This holds promise for much stronger consumer engagement.

Depending on the country, nearly a quarter of buyers who have recently bought a brand new car have downloaded the app.

OEM APP ADOPTION HAS ROOM TO GROW

Usage of Manufacturer Apps¹

(% of respondents having/using manufacturer apps²)



Note: Figures may not sum to 100% due to rounding.

1. Q23JB: Do you have an app from your manufacturer that links to your car?

2. Reflects only respondents who have bought a brand new car.

Source: Speedometer Survey 2024, OC&C analysis.

The features are there, but monetisation is challenging

The features consumers want from apps generally already exist, so low uptake is mainly a marketing issue - finding a salient hook that drives engagement can change the game.

However, consumer willingness to pay extra for connected technologies is comparatively low in developed markets, so monetisation will come from the sale of ancillaries: one in five would be open to the manufacturer proactively choosing and booking annual service via the app, a significant opportunity to get people to engage.



China's car owners think differently -

but this might be industry immaturity as much as a crystal ball for the West

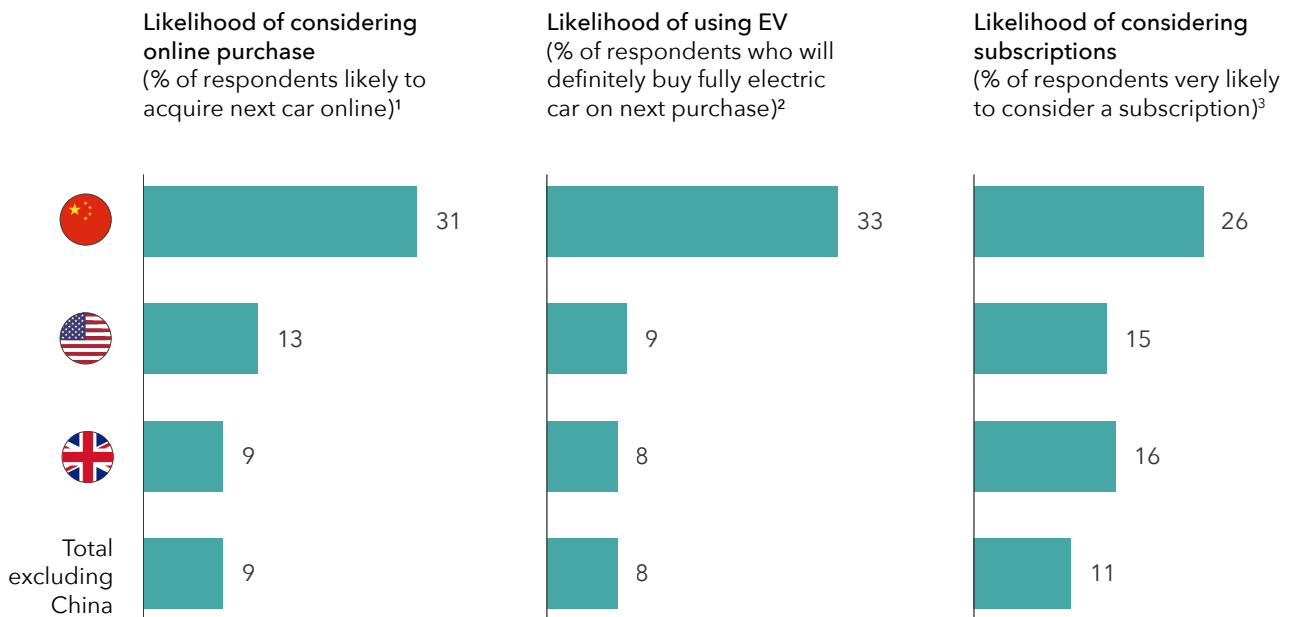
China's role in car exports - especially EVs - gets a lot of attention, but Chinese car consumers are also unique.

The car parc in China is still maturing, with a much lower share of used cars than in other countries, and car owners are younger and relatively wealthier in China than elsewhere. They are also much more open to new trends: Chinese buyers are three times as likely to buy their next car online as drivers in other countries, four times as likely to buy an EV, and twice as likely to want a subscription model.

It's still too soon to say whether Chinese consumer perspectives signal what's next for the rest of the world - or if the shift of the car parc over time to used cars and the mainstreaming of car ownership will draw China back to the physical realities that sustain traditional sales and service models in the West.

CHINESE CONSUMERS ARE MORE LIKELY TO SHOP ONLINE, BUY AN EV AND OPT FOR A SUBSCRIPTION MODEL THAN US OR UK CONSUMERS

China vs UK and US attitudes



1. Q26. Where do you expect to acquire your next car from? Respondents who said 'likely' to 'purchase on a website'.

2. Q28: When considering your next car, how likely are you to consider an electric/hybrid vehicle? Respondents who chose 'will definitely buy.'

3. If you were able to pay a monthly subscription for the vehicle of your choice (including insurance, maintenance and the ability to swap the vehicle if you wish) and it was within your monthly budget, how likely would you be to buy this offer? Reflects only respondents who drive.

Source: Speedometer Survey 2024, OC&C analysis.



This is not just about demographics – Chinese drivers are inherently more forward-thinking.

Where to rev up *to capture more value*

After years of rapid change, consumers and the automotive industry are settling into a new normal. Consumers have seen new offers and aren't moving as fast as the hype. They are open to new propositions but increasingly know what they want - and what they don't - with an enduring focus on affordability.

The paths to performance



OEM captive-finance and other finance providers have an important role to play early in the consumer's digital purchase journey, with lessons to be learnt from other financial services players and the opportunity to extend their role further into used-car purchases and spread the cost of motoring.



OEMs will need to **lean into the functional marketing of cars** – advertisements with sweeping vistas aren't where the consumer is. They can also focus on improving communications and educating consumers to address lingering concerns around EVs.



OEMs and dealers can drive up profit and bay utilisation by **push booking annual services via connected car apps** – increasing utilisation of repair shops as they balance this with vehicle preparation.



Governments should **focus EV spending on infrastructure**, not subsidies. For OEMs and dealers, a free home charger with EV purchases could also hold promise.



Dealers and other retail channels will need to **digitalise the consumer purchase journey online and in store**, centered around a single-customer view of the deal (finance, part-exchange and next vehicle all included).



Car buying services have **an opportunity to continue to unbundle the part exchange journey** and capture share.



Auto marketplaces like Auto Trader and CarGurus are embarking on business model version 2.0 – in which they have significant opportunity to capture value from generating customer leads, often ready to close – while keeping one step away from conducting the vehicle sale itself.



Leading software and data providers are powering this omnichannel journey in a truly seamless journey for the customer – but also for the dealer and other parties.



All parties are tracking Chinese consumer behaviours and business models to predict their impact on consumers in other markets.





About the research

The Global Automotive Disruption Speedometer is now in its fourth year. We surveyed 8,480 consumers, of whom 7,512 are drivers, asking ~45 questions on their car decisions and driving habits to understand how consumer attitudes and behaviours towards the auto industry are changing and the impact this will have on the industry. The study covered nine countries: Australia, Canada, China, France, Germany, Italy, the Netherlands, the UK, and the US.

Get more detailed analysis and advice on your industry

This report just scratches the surface of the in-depth insight the 2024 Speedometer report delivers on the automotive industry.

Whether you sit in vehicle manufacturing, retail, automotive services, leasing/rental or insurance, OC&C has the expertise and experience around the world to help you come out on top. Drop us a line today, we'd love to chat.

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