

Trends and expectations of  
automotive customers regarding  
innovative technologies in 2019

Results of an EY Survey among Pole,  
Slovak, Czech and Hungarian drivers

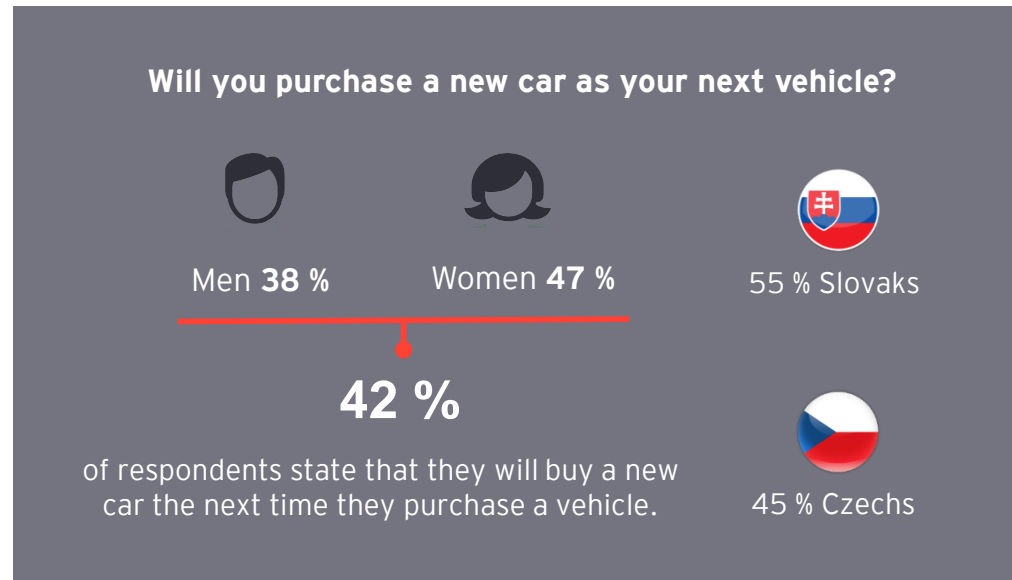
2019



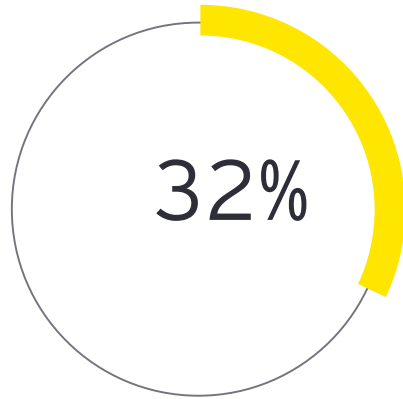
# Automotive Survey methodology

The survey **among drivers in Poland, the Czech Republic and Slovakia** was directed by EY in cooperation with the STEM/MARK polling agency with the objective of identifying current trends related to purchases of new and used vehicles and identifying customers' opinions about potential innovative solutions in the automotive industry.

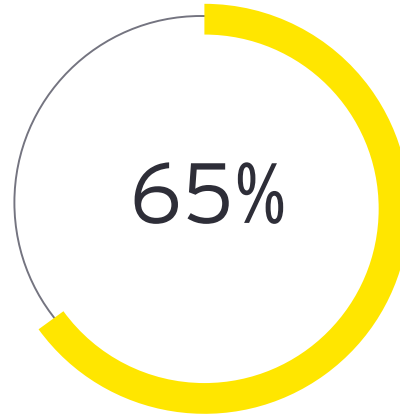
Throughout March and April 2019, STEM/MARK, commissioned by EY, contacted a representative sample of respondents from Poland, the Czech Republic and Slovakia who **hold a driving license, are active drivers and belong to the age category 20 - 60 years** to answer.



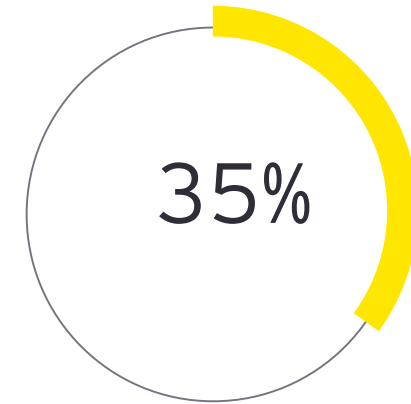
# Key findings from the survey



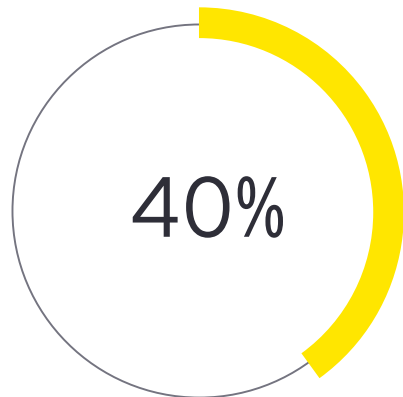
of respondents are open to buying a car over the internet  
33 % SK, 33% CZ



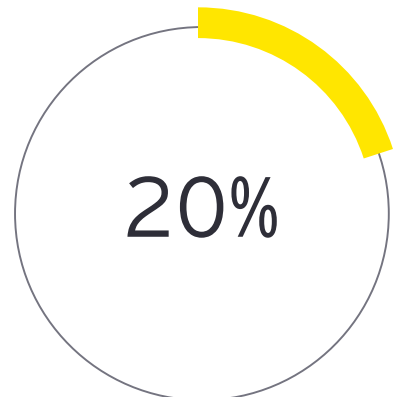
of respondents think about purchasing electric vehicles  
72 % SK, 63 % CZ



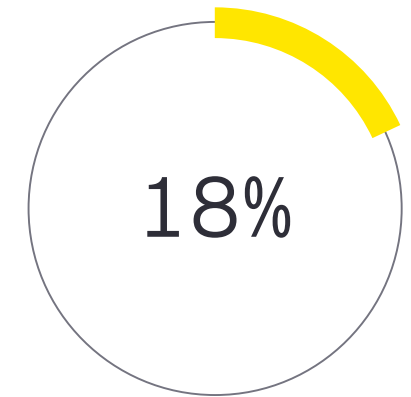
of respondents are willing to pay up to 15% for subscription model service  
23 % SK, 14 % CZ



of respondents would choose their pick-up location for new bought cars online at their preferred dealership  
70 % SK, 79 % CZ



of respondents plan to buy diesel powered car  
18 % SK, 18 % CZ



of respondents are willing to provide data on their driving style to improve the products by the manufacturer  
66 % SK, 50 % CZ

# Where will you buy your next car?

## New car

If you could choose optimal location, where you can buy a new vehicle, where would it be?

79 %

of respondents would buy new car in classical dealership.

10 %

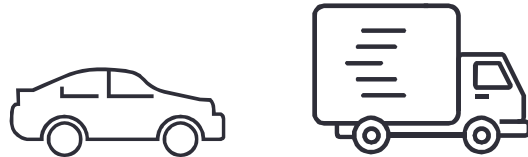
of respondents would buy new car in experience center.

6 %

of respondents would buy new car in online sales.

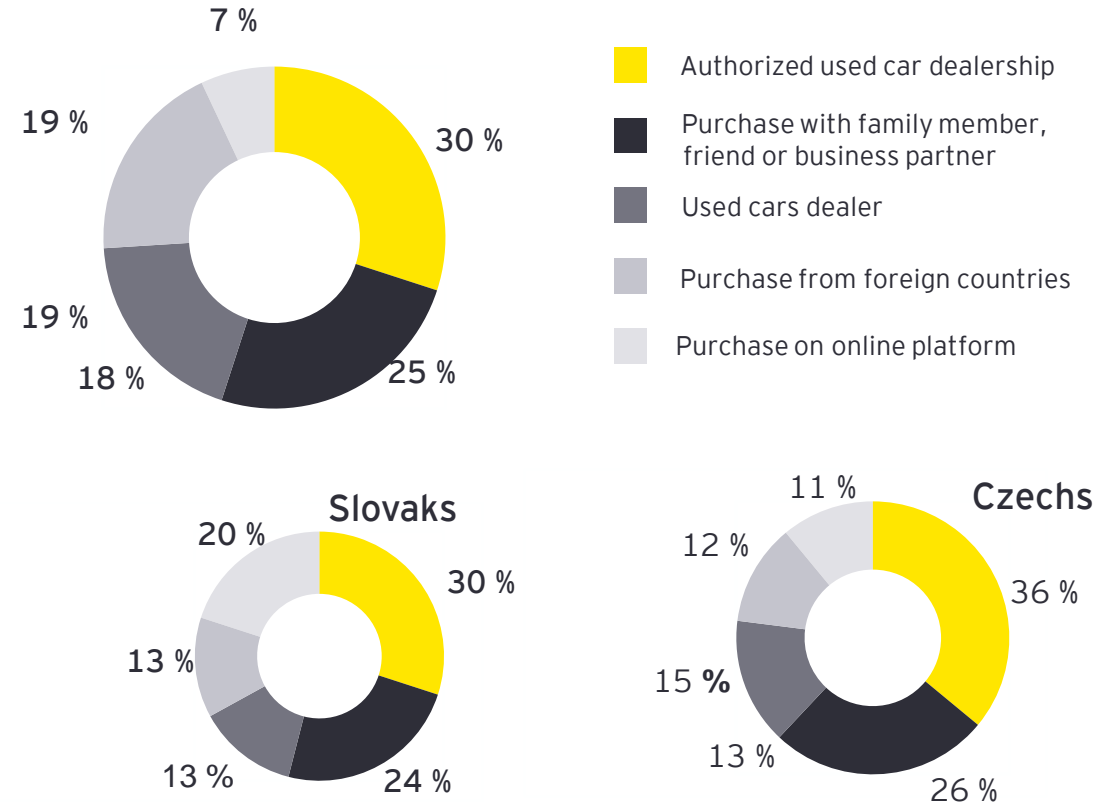
5 %

of respondents would buy new car in shopping mall.

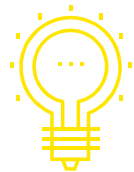


## Used car

Where would you buy used car?



**When buying new or used car, authorized dealership is the preferred option. A quarter of the respondents would buy a used car from a family, friend or business partner.**



# How will you choose your next vehicle?

What is the average number of visits at dealership before a vehicle purchase?



Poles 1,6



Slovaks 2,3



Czechs 2,2

Average number of visits by age

1,6

20 - 29 years

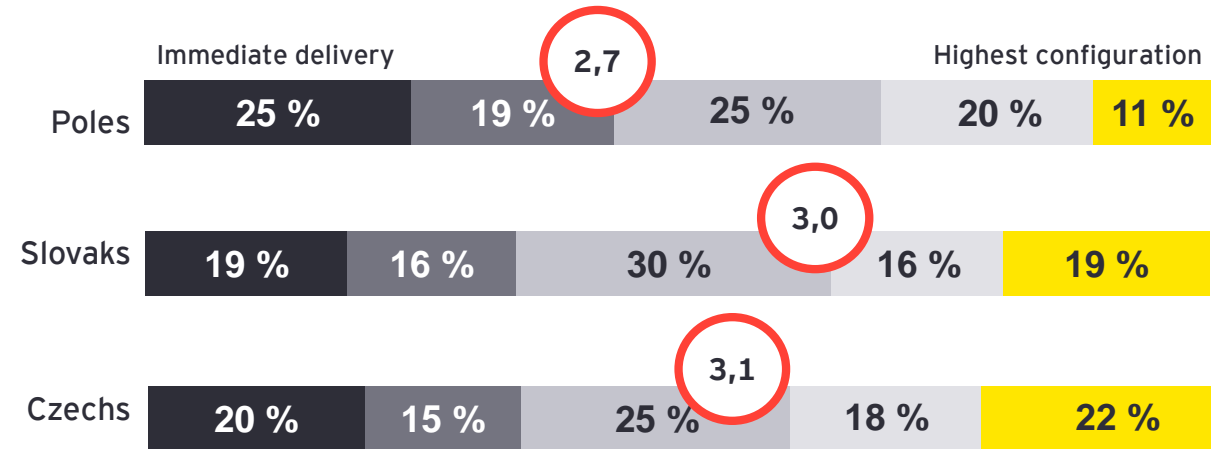
1,7

30 - 44 years

1,4

45 - 60 years

Do the drivers need to configure their future vehicle or do they prefer fast delivery?

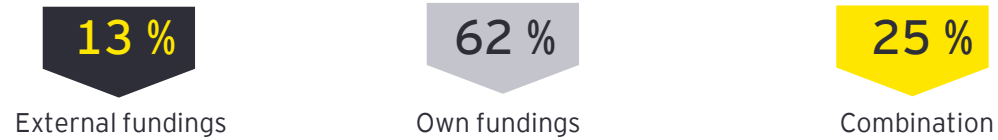


What kind of engine will the drivers choose for their next vehicle?

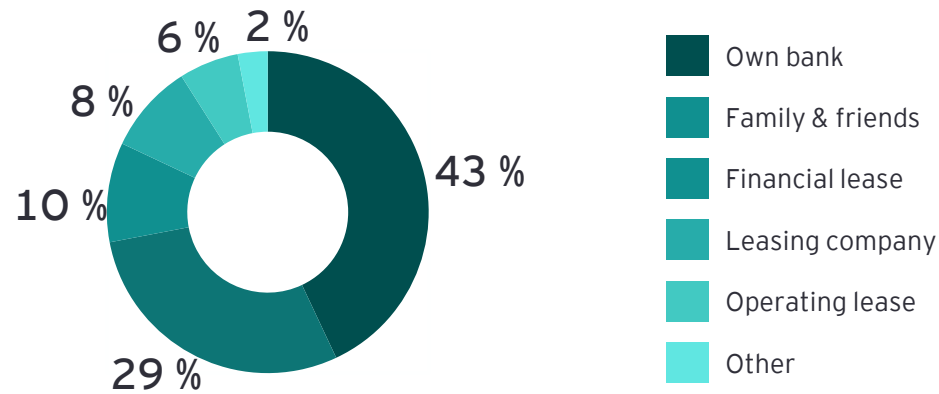
	Petrol	Diesel	Hybrid	Electric	Gas (CNG/LPG)	Not yet decided
Poles	28 %	20 %	10 %	1 %	19 %	22 %
Slovaks	40 %	18 %	13 %	4 %	4 %	22 %
Czechs	43 %	18 %	5 %	3 %	4 %	27 %

# How do you get enough fundings?

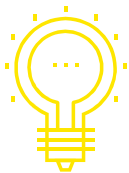
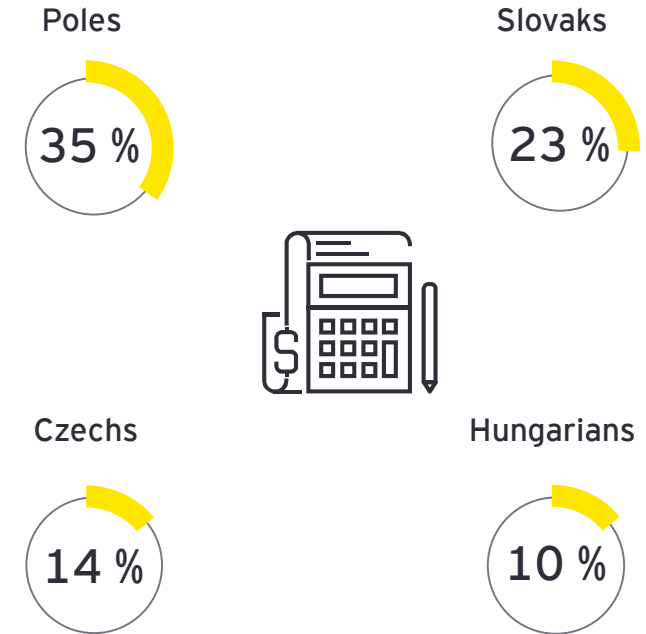
What kind of fundings would you most likely choose, when you will buy your next vehicle?



If you choose to use external fundings, what source would you probably use?



Are drivers willing to pay subscription, if they will be able to change vehicles according to their needs?

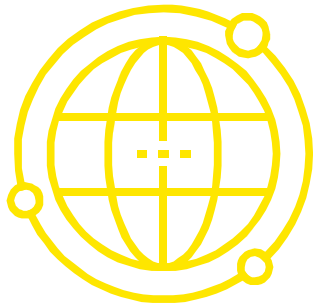


**Despite the fact, that borrowing money from their bank is more expensive, 4 out of 10 Poles choose it as preferred option.**

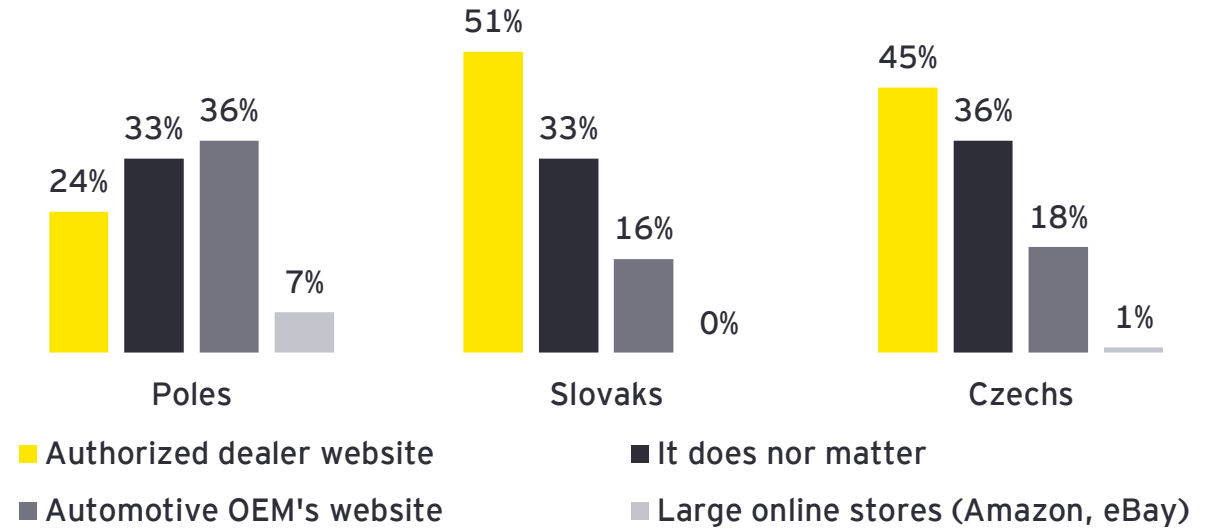


# And will you buy your vehicle online?




To what extent would drivers consider buying their vehicle on the internet?



While purchasing a car online, what website would the drivers most likely use?



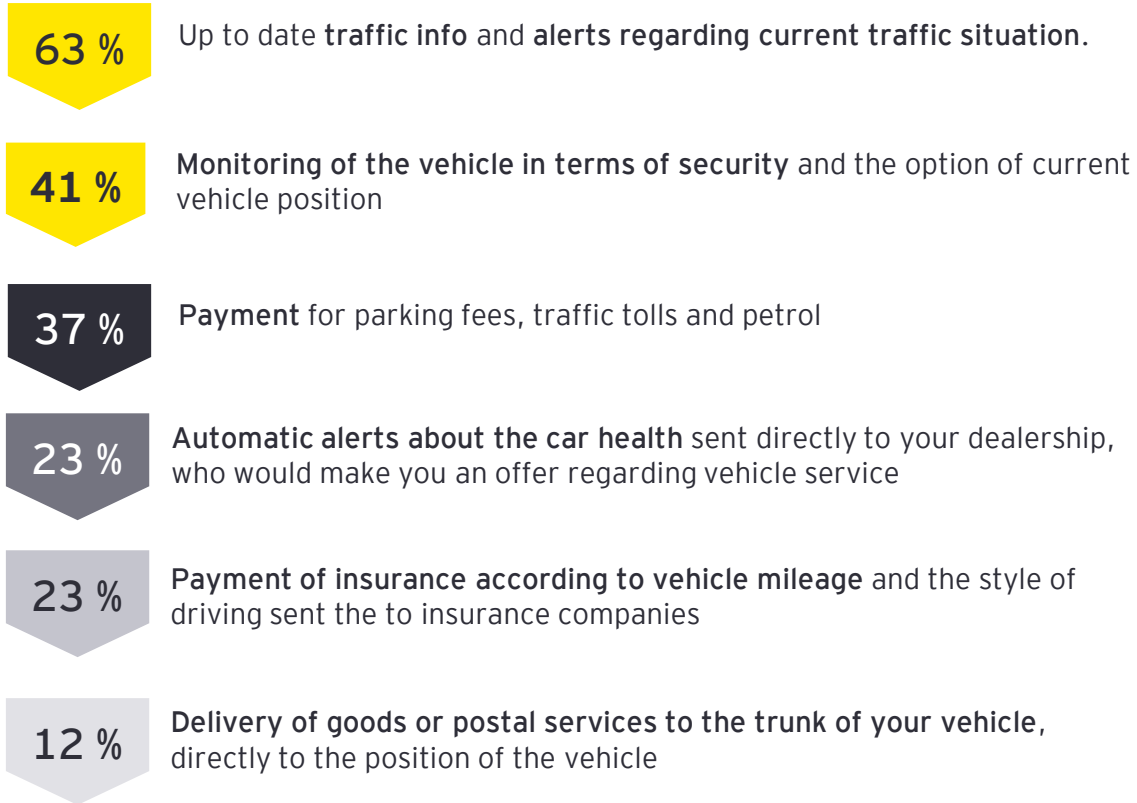
Which online tools would respondents use during their online purchase?

	Price calculation	Trade-in of used car	Test drive reservation	Vehicle configurator	Financing offer
 Poles	<b>45 %</b>	<b>22 %</b>	<b>51 %</b>	<b>25 %</b>	<b>23 %</b>
 Slovaks	<b>95 %</b>	<b>75 %</b>	<b>86 %</b>	<b>69 %</b>	<b>67 %</b>
 Czechs	<b>88 %</b>	<b>80 %</b>	<b>78 %</b>	<b>72 %</b>	<b>54 %</b>

Expectations of automobile customers purchasing new vehicles

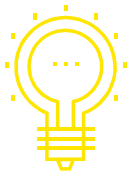
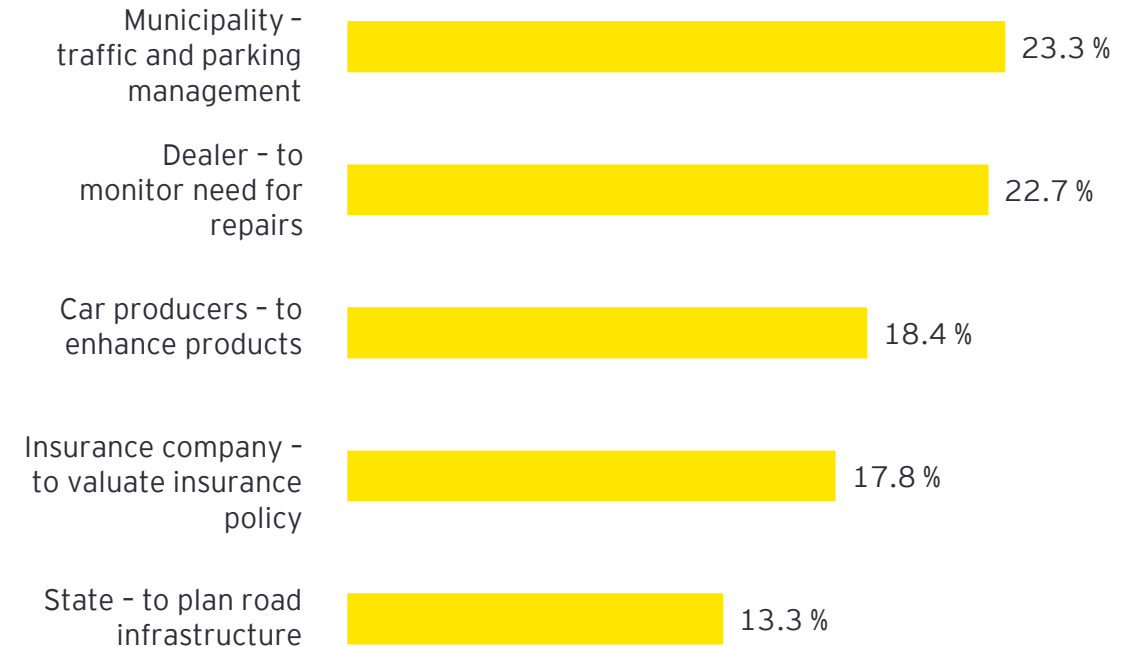
# Are you willing to pay more for a car connected to the internet?

## Which features regarding the connectivity to the internet would you use?\*



\* Respondents could choose multiple answers

## Which purpose would convince you to share your car data?



**Polish drivers would primarily use the features of traffic info and vehicle security. Although willingness of paying for these internet features among Polish drivers is rather low.**



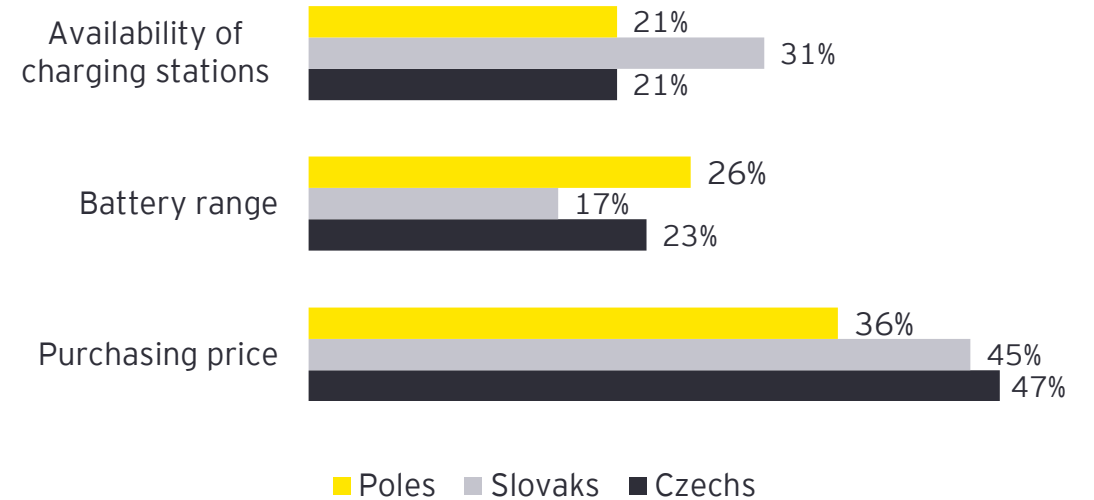
# Are you interested in electromobility?

To what extent would the drivers consider buying an electric vehicle in the future?\*

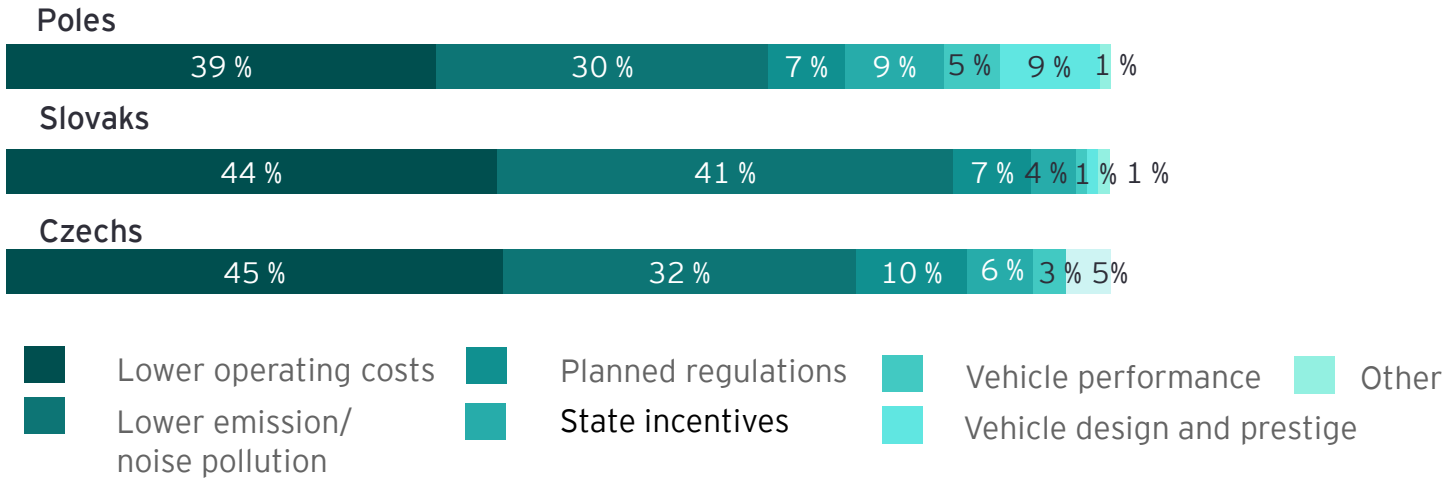


\* The displayed percentages correspond to the percentage of respondents who definitely want to buy electric car and those who would consider it in case of a good price offer.

What discouraged the drivers from buying an electric vehicle?

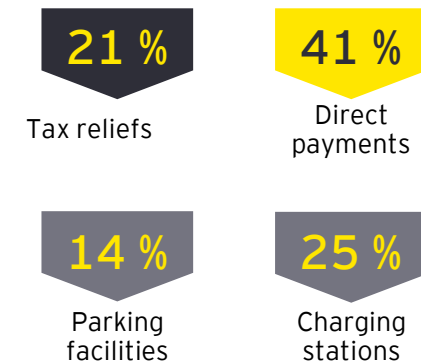


Why are the drivers interested in buying an electric vehicle?\*



\*\* Only respondents interested in buying an electric vehicle were asked to respond.

What could be done by the State to increase demand for electromobility?



Thank you for your attention



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