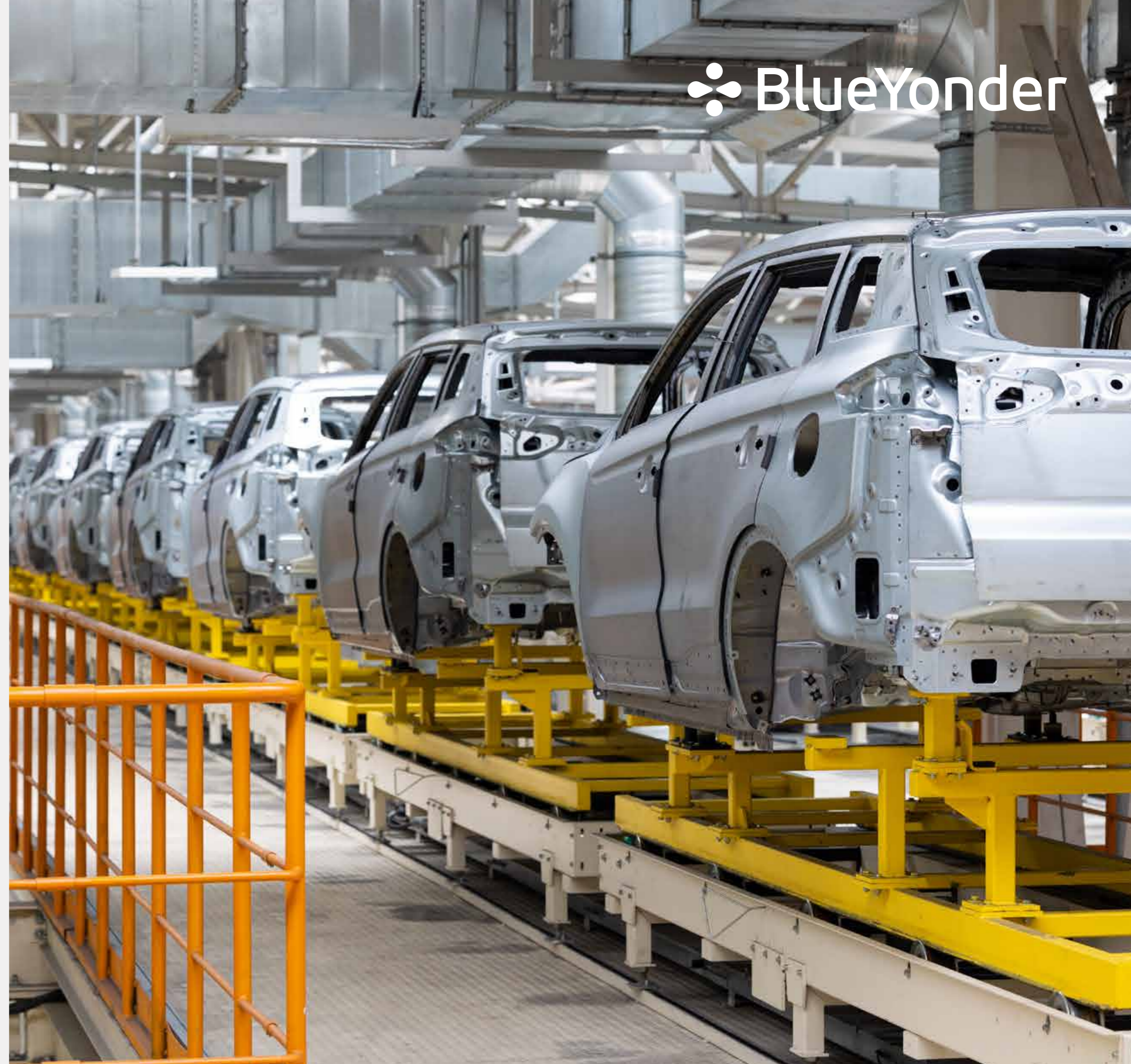


Automotive Personalization Survey

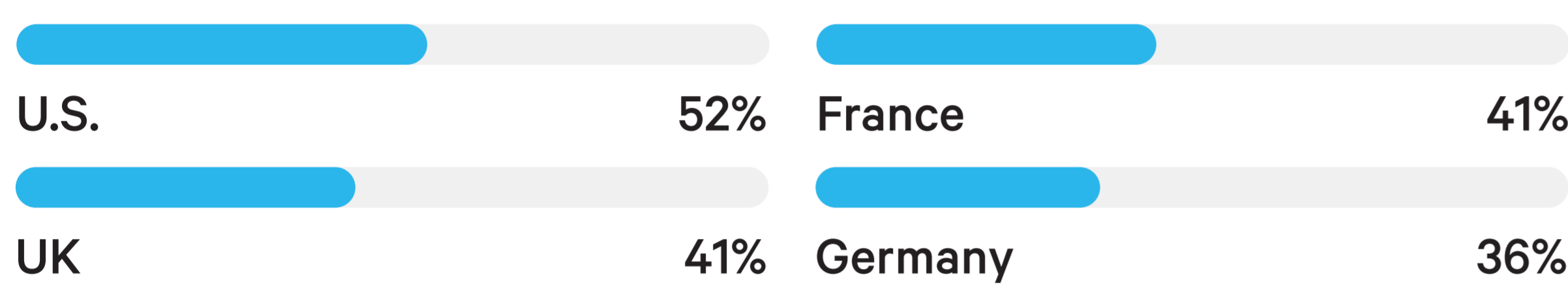
Personalization Versus Value — Where Automotive Consumers Are Heading



Car Buyers Prioritize and Will Pay for Personalization

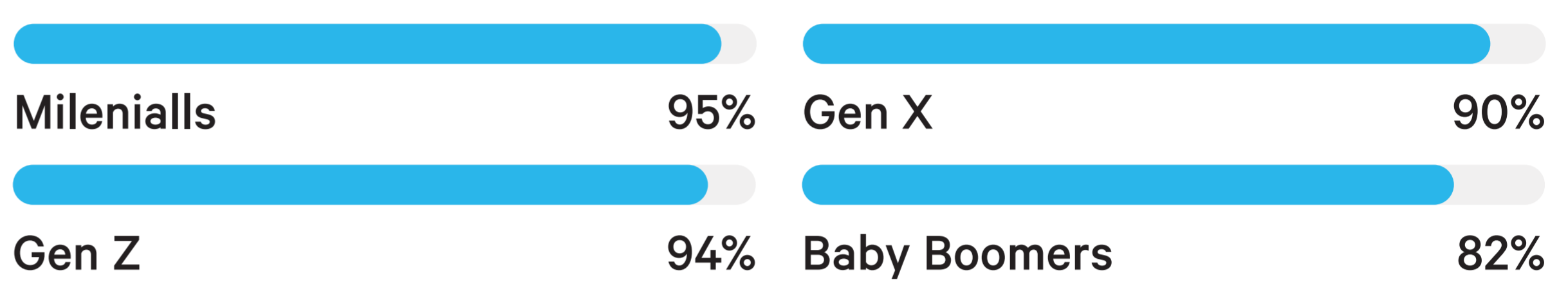
43%

of overall respondents say personalization options are important or extremely important in their decision



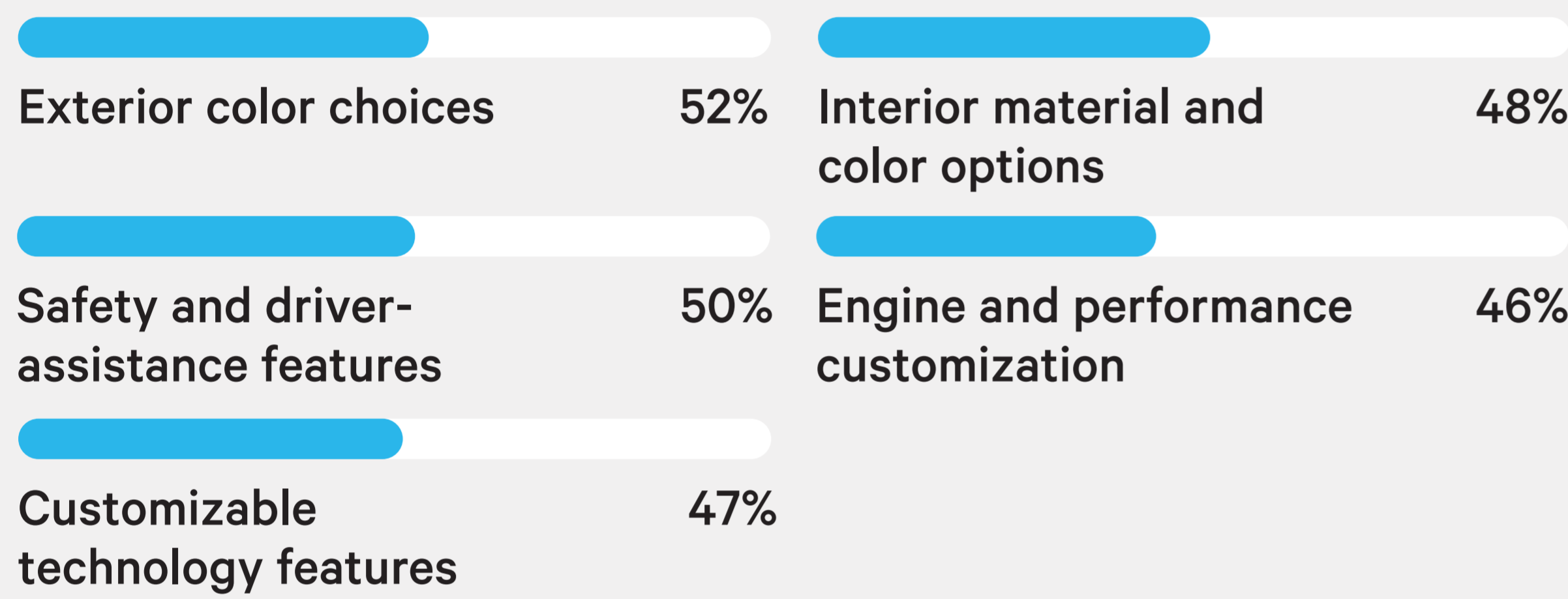
92%

of overall respondents are willing to pay extra for personalized features

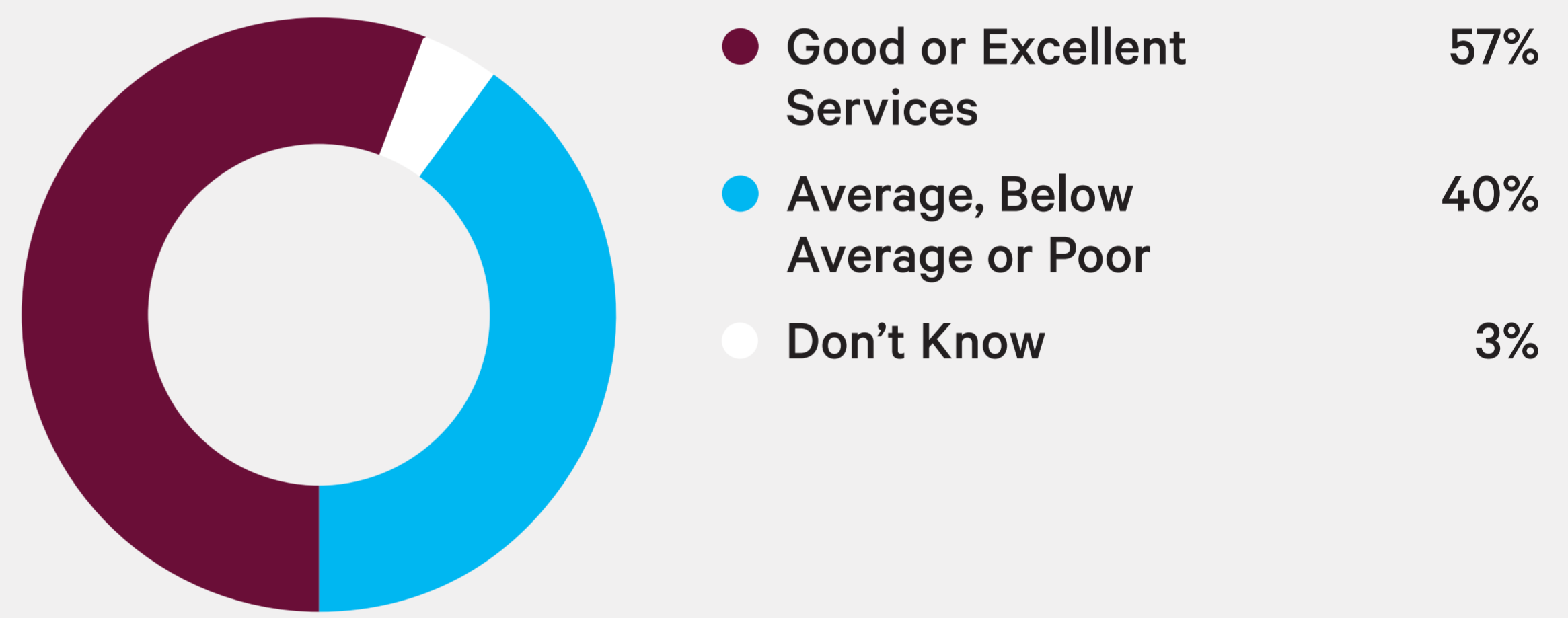


Manufacturers Have Room To Improve Personalization Offerings

The most valued personalization options:



Overall respondent sentiment around the ability of manufacturers to meet personalization requests:



Speed of Delivery Matters

85%

of overall respondents say 1 - 6 months is an acceptable delivery time

80%

of overall respondents would compromise on personalization for faster delivery

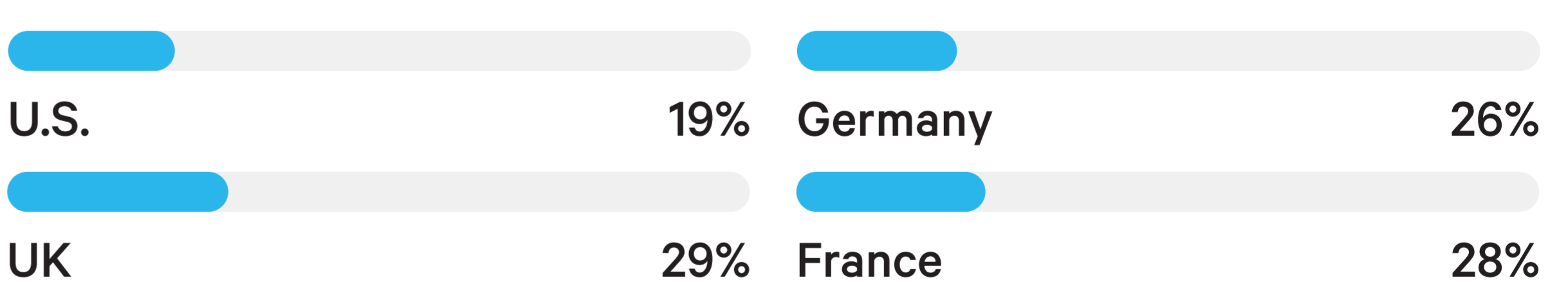


Attitudes Toward Sustainability and Electric Vehicles (EVs) Differ Between the U.S. and Europe

25%

of overall respondents see sustainability and EV options as a primary factor in their purchase decision

However, the U.S. is an outlier:



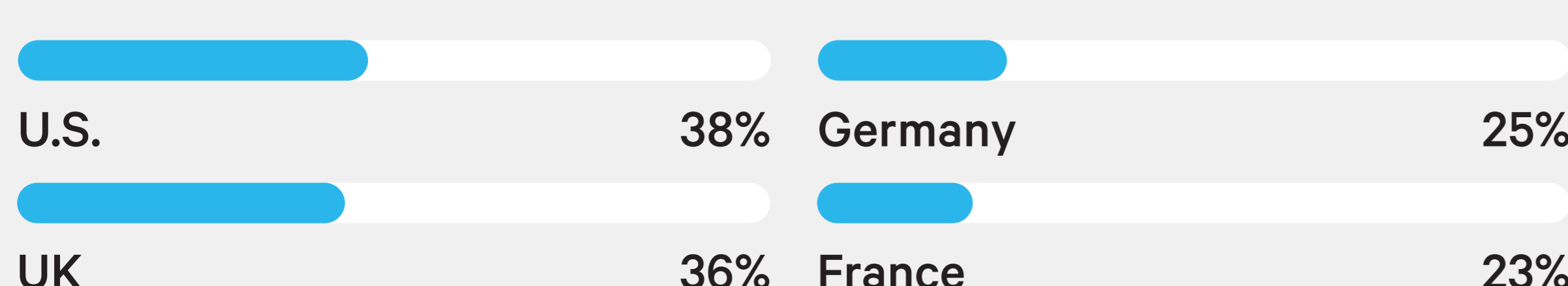
Interest Rates Influence Buying Decision — and Show a Geographic and Generational Divide

86%

of overall respondents are likely to compromise on personalization to lower the cost of the vehicle due to high interest rates

43%

of overall respondents would delay a purchase due to high interest rates



81%

of overall respondents say their car buying decision is influenced by interest rates

