CONCLUSION

AUTOMAKERS HAVE A SALES JOB TO DO

For automakers to achieve their revenue aspirations by charging consumers extra for on-demand features, they have work to do.

75%
expect most features and services to be part of the total purchase price

1 in 5
say they have tried subscribing to services, either on a free trial basis or they paid

25%
express some willingness to pay extra monthly or annually depending on feature/service and price

About half
know that paying extra on a subscription basis is a thing

Field Dates: Consumers- 01/19 – 01/26/22
Consumers: n= 217 (Intend to purchase NEW vehicle in NEXT 2 years)
### NO, WE WON’T PAY!

75% will not pay for subscribing. Consumers expect most features and services to be part of the purchase price.

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<th>Creature Comforts</th>
<th>Safety Features</th>
<th>Technology Offering</th>
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<td>Expected in the price of vehicle:</td>
<td>Expected in the price of vehicle:</td>
<td>While a majority expect...</td>
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<tr>
<td>92% Heated/cooling seats</td>
<td>89% Lane-keeping assist</td>
<td>In-vehicle WIFI</td>
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<td>89% Remote start</td>
<td>87% Automatic emergency braking</td>
<td>Stolen vehicle location</td>
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**Technology Offering**

Half expect features that track the vehicle's operational performance and service to be part of the purchase price. But they are less adamant about refusing to pay extra for them.
25% of consumers might pay extra for some things

Safety Features
Of consumers willing to subscribe, 80% would pay up to $35/month for safety features, like lane-keeping assist and automatic emergency braking.

Vehicle Performance Features
Consumers willing to subscribe would pay up to $25/month for upgraded horsepower and torque, over-the-air software updates, stolen vehicle tracking and features to track the vehicle’s operational performance and service. For EVs, only 39% would pay extra for added range.*

Creature Comforts
Of consumers willing to pay extra, they would pay $15 to $31/month for creature features, like heated/cooling seats and remote start. Less than half would pay more for Wi-Fi.

*Likelihood to pay for specific feature is among those who in general are open to paying for a subscription and expecting that feature to be offered through a subscription, and the estimated amount willing to pay is then among those likely to pay for that particular feature.