

# SOFTWARE SUBSCRIPTION SERVICES

BIG PICTURE

Field Dates: Consumers- 01/19 – 01/26/22  
Consumers: n= 217 (Intend to purchase  
NEW vehicle in NEXT 2 years)

## 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

**About half**

know that paying extra on a subscription basis is a thing



**1 in 5**

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

**25%**

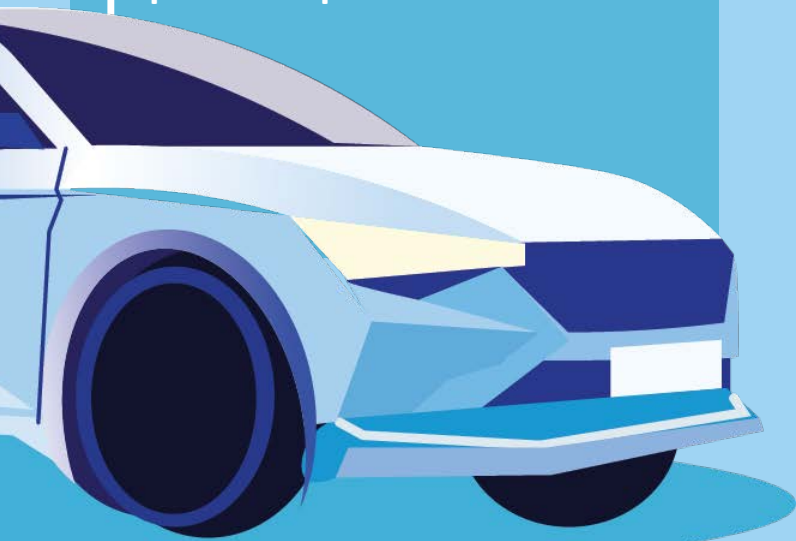
express some willingness to pay extra monthly or annually depending on feature/service and price



# NO, WE WON'T PAY!

# 75%

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



# 1

## Creature Comforts

are at the top of the list for what is expected in a vehicle purchase.

Expected in the price of vehicle:

 **92%** *Heated/cooling seats*



 **89%** *Remote start*



# 2

## Safety Features

are expected as part of the purchase price as well by almost as overwhelming percentages.

Expected in the price of vehicle:

 **89%** *Lane-keeping assist*



 **87%** *Automatic emergency braking*



# 3

## Technology Offering

While a majority expect...



to be part of the purchase price, they recognize these features also are offered by subscription.

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



**\$30 - \$35**  
per month

## 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.



**\$20 - \$25**  
per month

## 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.\*



**\$15 - \$31**  
per month

## 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.*