

GLOBAL AUTO WHITE PAPER 2022

The road ahead for future car buying

yougov.com/automotive

YouGov[®]

Inside

03

Introduction

04

Part 1:
The evolution of car buying

16

Part 2:
Car purchase drivers

24

Part 3:
The E-evolution

36

Summary

37

Methodology



► Introduction

Over the last few years, the auto industry has experienced a series of challenges. Throughout the pandemic, car manufacturing slowed, supply chains were disrupted, and car purchasing plummeted across the regions. Consequently, many dealerships were under pressure to close their doors. However, more recently, there has been a huge bounce back in demand, and coupled with the shortages associated with manufacturing, and supply chain issues, auto retailers were able to raise prices to reflect this short supply, and high demand.

The pandemic escalated digital transformation across all sectors, and within the auto industry many manufacturers and retailers were forced to digitize almost immediately to better serve their customers and help maintain sales. As an industry that traditionally relied on in-person transactions, this was a significant shift in business operations and has resulted in many more options for where, when, and how, consumers can buy a new, or used car. For new-car sales, for example, Tesla have transformed the direct-to-consumer space, whilst in used-car sales, Carvana have introduced new ways to reach consumers directly, without a traditional car-dealer experience.

In terms of evolving consumer needs, the EV market witnessed the biggest increase in registrations in 2020. Contributing factors include a drop in total miles driven due to the pandemic, the flexibility of working from home, and the growing interest in sustainability and environmental conservation issues across the regions. To accommodate the growing

demand for EVs, many auto manufacturers are expanding their range of EVs, and in some markets, the auto industry is receiving government support and funding to transform this environmentally conscious sector, including the introduction and development of charging point infrastructures.

Whilst Tesla started the prestige electric car revolution nearly a decade ago, almost every major brand and luxury car specialist now produces electric cars, whilst still retaining their prestige appeal whether it's the styling, interiors, or performance.

Based on new YouGov research among consumers in 18 international markets, this report will explore if consumers are adopting the new digital disruptors by examining their past and future car purchase behaviour and the interest and appetite for electrification in the luxury and premium global auto market.

Please note, our samples in East Asian markets such as China, Hong Kong, Singapore and India are not all nationally representative (with some being representative of the online or urban population; see methodology for details)

► [LEARN MORE ABOUT OUR DATA](#)

A photograph of a family of three—a woman, a man, and a young child—gathered around a wooden dining table. They are all looking down at a smartphone held by the woman. The woman has long brown hair and is wearing a dark blue top. The man has short dark hair and is wearing a teal shirt. The child is wearing a white top. On the table, there is a white bowl of fruit and a laptop. The background shows white kitchen cabinets.

PART - 1

The evolution of car buying

Using YouGov data we examine the channels of choice for global consumers in their past and future car purchasing journey. Exploring how they made their last car purchase, and whether they intent to stick with that approach, or adopt a new path to purchase.

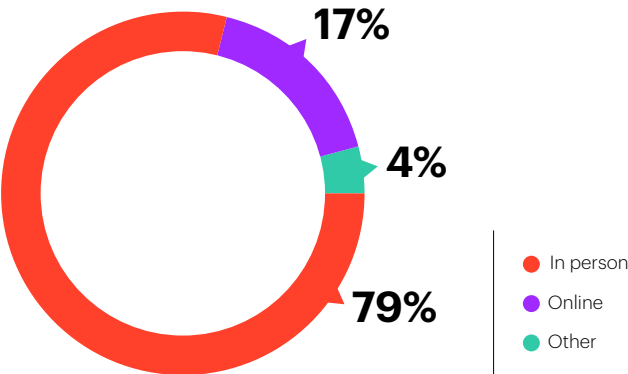


Car purchasing channels past and future

Looking at the most recent vehicle purchase among global consumers, our research reveals that traditional purchasing methods outweigh digital options. Almost eight in ten (**79%**) car purchasers opted to buy their most recent vehicle in-person, compared to **17%** who purchased online.

Of all car buyers opting for a face-to-face transaction, the vast majority used a dealership, rather than a private owner. Among the digital adopters, almost equal proportions bought online from a manufacturer who has a hybrid approach (selling both online and in-person), as those who bought from car retailers who solely sell online.

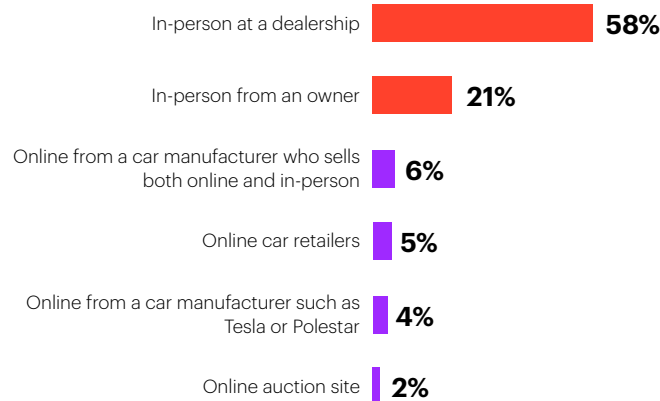
Previous car purchase online vs. in-person



Thinking of your last vehicle purchase, how did you buy your car?

How previous vehicle was purchased

Global car buyers



Thinking of your last vehicle purchase, how did you buy your car?

Comparing how global consumers have made their most recent car purchase by age, our research confirms that older car buyers prefer more traditional buying options,

whilst younger consumers are more likely to explore digital alternatives.

How previous vehicle was purchased – global car buyers by age

	Global total	18-24	25-34	35-44	45-54	55+
In-person at a dealership	58%	35%	43%	52%	61%	74%
In-person from an owner	21%	24%	26%	25%	20%	16%
Online from a car manufacturer who sells both online and in-person, such as Ford, Honda, Volkswagen, Toyota, etc.	6%	12%	8%	7%	5%	3%
Online car retailers	5%	8%	6%	5%	5%	2%
Online from a car manufacturer such as Tesla or Polestar (manufacturer that only sells cars online)	4%	7%	7%	4%	2%	1%
Online auction site	2%	5%	4%	3%	2%	1%
Other	4%	7%	5%	4%	4%	3%

Thinking of your last vehicle purchase, how did you buy your car?

► [FIND OUT HOW OUR SOLUTIONS CAN HELP YOU](#)





Looking to the future, are consumers considering sticking with their previous path to purchase, or considering new ways to buy their car?

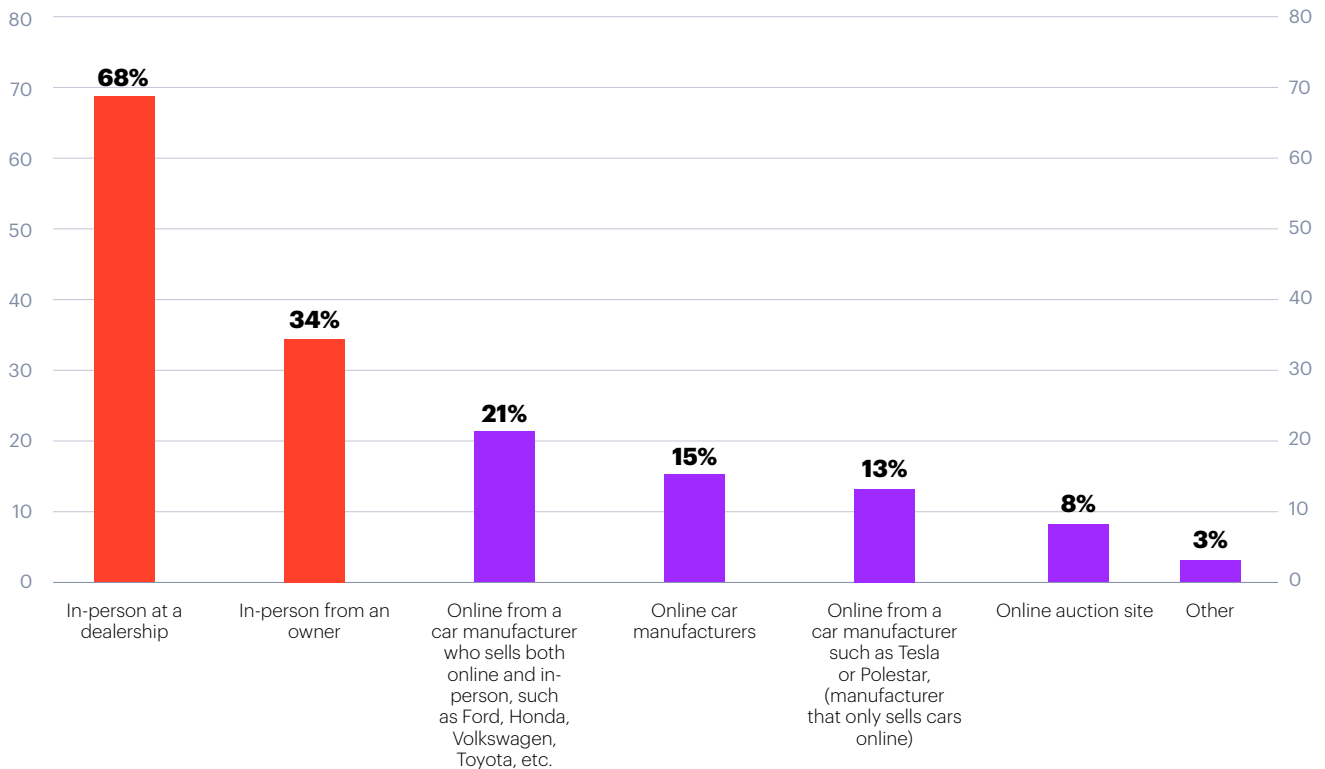
A digital transition for car buyers

In recent years we have seen an influx of digital disrupters unbalancing the vehicle path to purchase status quo. YouGov research explores whether global consumers are likely to embrace these new methods in the future, and if so, to what extent?

The global data shows that the vast majority (**68%**), of future car buyers would still consider buying in-person at a dealership, and just over a third (**34%**) would consider buying in-person privately. On the other hand, over one

in five (**21%**) would also consider buying from an online car manufacturer that offers both physical, as well as online purchase options, giving customers the freedom to approach the car buying process in the way that works best for them. Looking at other path to purchase options we see digital playing a bigger role, **15%** of global consumers would purchase from an auto retailer such as Carvana, Vroom, or Cazoo, and **13%** from a manufacturer that only sells cars online such as Tesla or Polestar.

How would you consider purchasing your next vehicle Global total



Which of the following options would you consider purchasing for your next vehicle purchase?



So, which consumers prefer the traditional methods and which are embracing the new paths to vehicle purchase?

Traditional methods of vehicle purchase more popular with older consumers

As we have seen earlier, in-person dealerships remain a crucial touch point in the vehicle purchase journey, and this is even more important for older car buyers.

YouGov data reveals that seven in ten future car buyers aged 45-54 would prefer the face-to-face interaction and the reassurance of in-person dealerships, increasing to more

than eight in ten among those aged over 55. Comparing other alternative purchase methods amongst 55-year-olds, they are less likely to consider any other option, suggesting a greater reliance on this traditional brick and mortar method.

► **SPEAK TO A RESEARCHER**

Discover living data

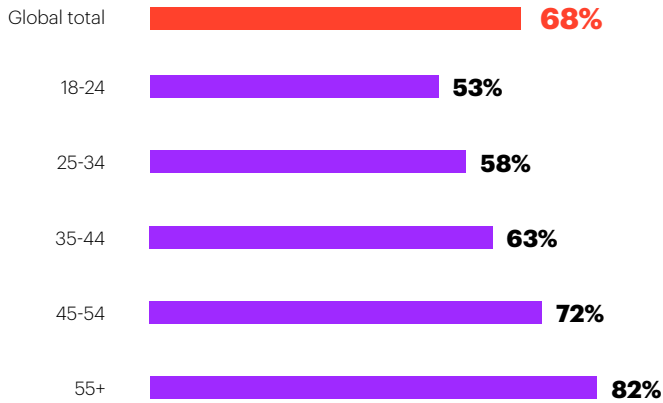
Speak to sales

Launch a survey

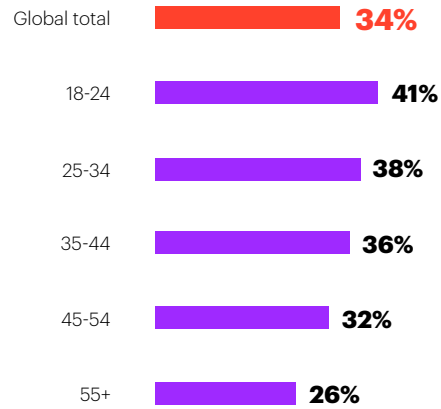
How consumers would consider purchasing their next vehicle

Global, by age

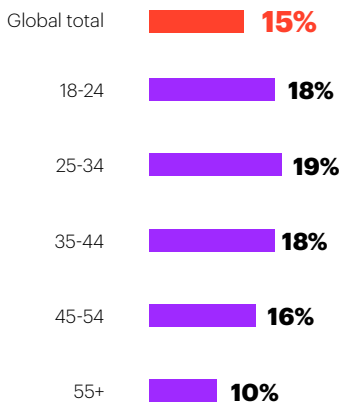
In-person at a dealership



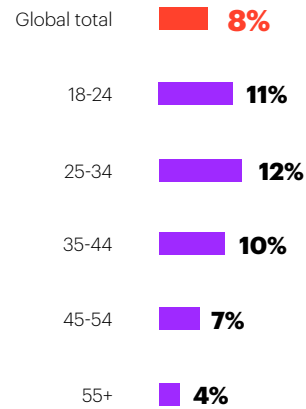
In-person from an owner



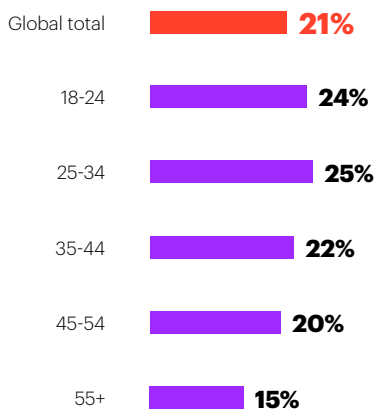
Online car retailer



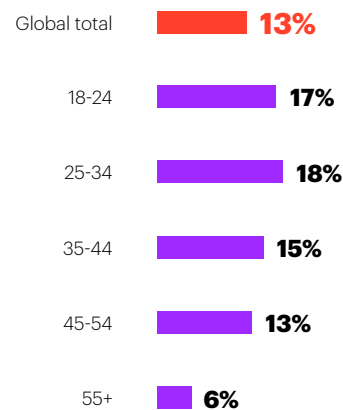
Online auction site



Online from a car manufacturer who sells both online and in-person, such as Ford, Honda, etc.



Online from a car manufacturer such as Tesla or Polestar, (manufacturer that only sells cars online)



Which of the following options would you consider for your next vehicle purchase?



Over the last two years, the auto industry has experienced a great deal of disruption. At the beginning of the pandemic, many dealerships were pressured to close their doors, and for an industry that historically relied on in-person transactions, they had to evolve and accelerate to digital options at pace. But what groups are more interested in these new digital approaches? And which markets are ahead of the game in terms of digital transactions within the auto sector?

Younger happier to shun the showrooms

Exploring the online path to purchase, our research reveals that younger generations are happy to skip the showroom experience and jump online. As digital natives who are used to doing almost everything online, purchasing big ticket items such as cars is no exception. Under 44-year-olds are more likely than their older counterparts to consider purchasing their next vehicle online, and their level of enthusiasm for online only car brands is also evident.

► [LEARN MORE ABOUT OUR DATA](#)

Physical matters across most countries

Looking at future potential vehicle purchasing methods, we see some differences emerge by country. Focussing on the most popular methods of car buying, YouGov data shows that Denmark and Great Britain over index for more traditional approaches: with more than eight in ten considering buying their next vehicle in-person at a dealership. Poland, where car ownership and the second-hand car market in general is strong, records the highest level of potential face-to-face private transactions, but lower levels of face-to-face dealership consideration. Poland and China are the only two countries where private purchasing is higher than via a dealership.

[Discover living data](#)

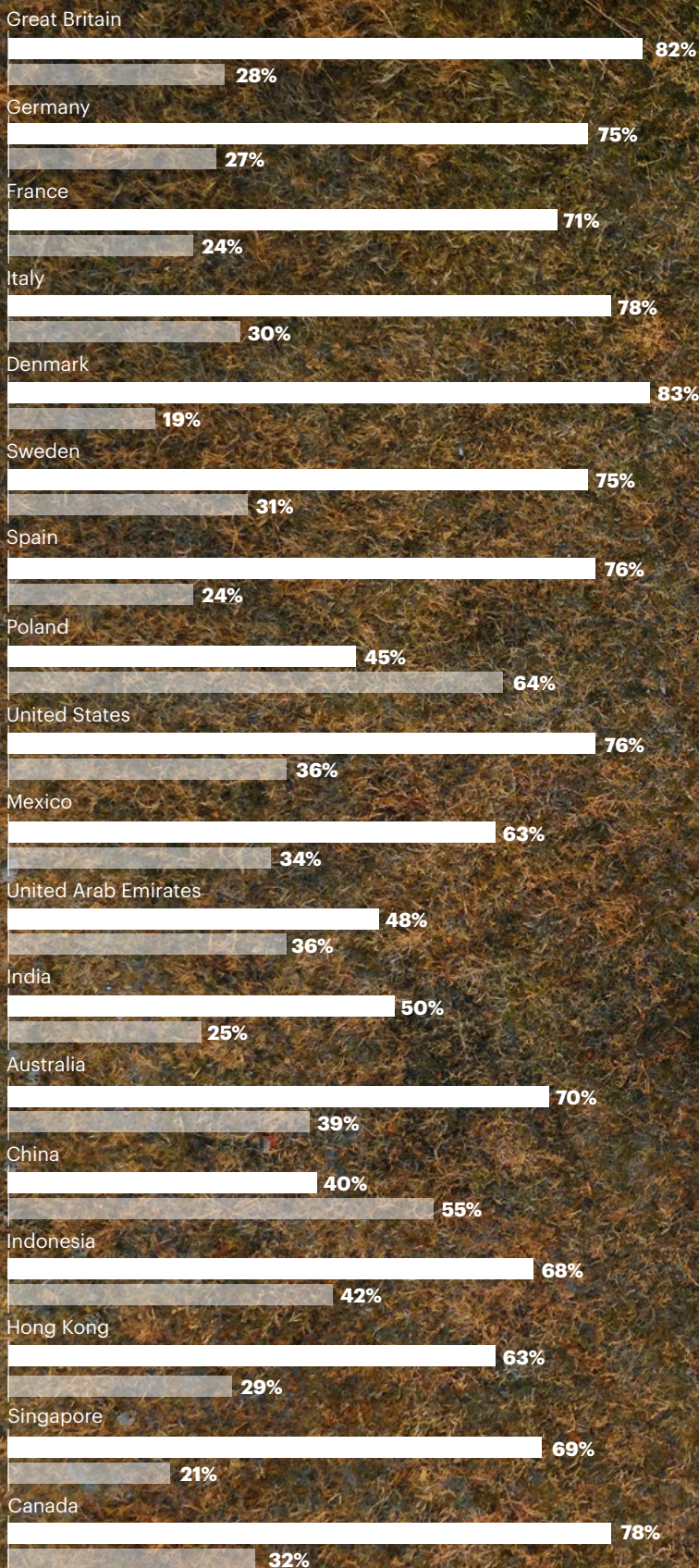
[Speak to sales](#)

[Launch a survey](#)

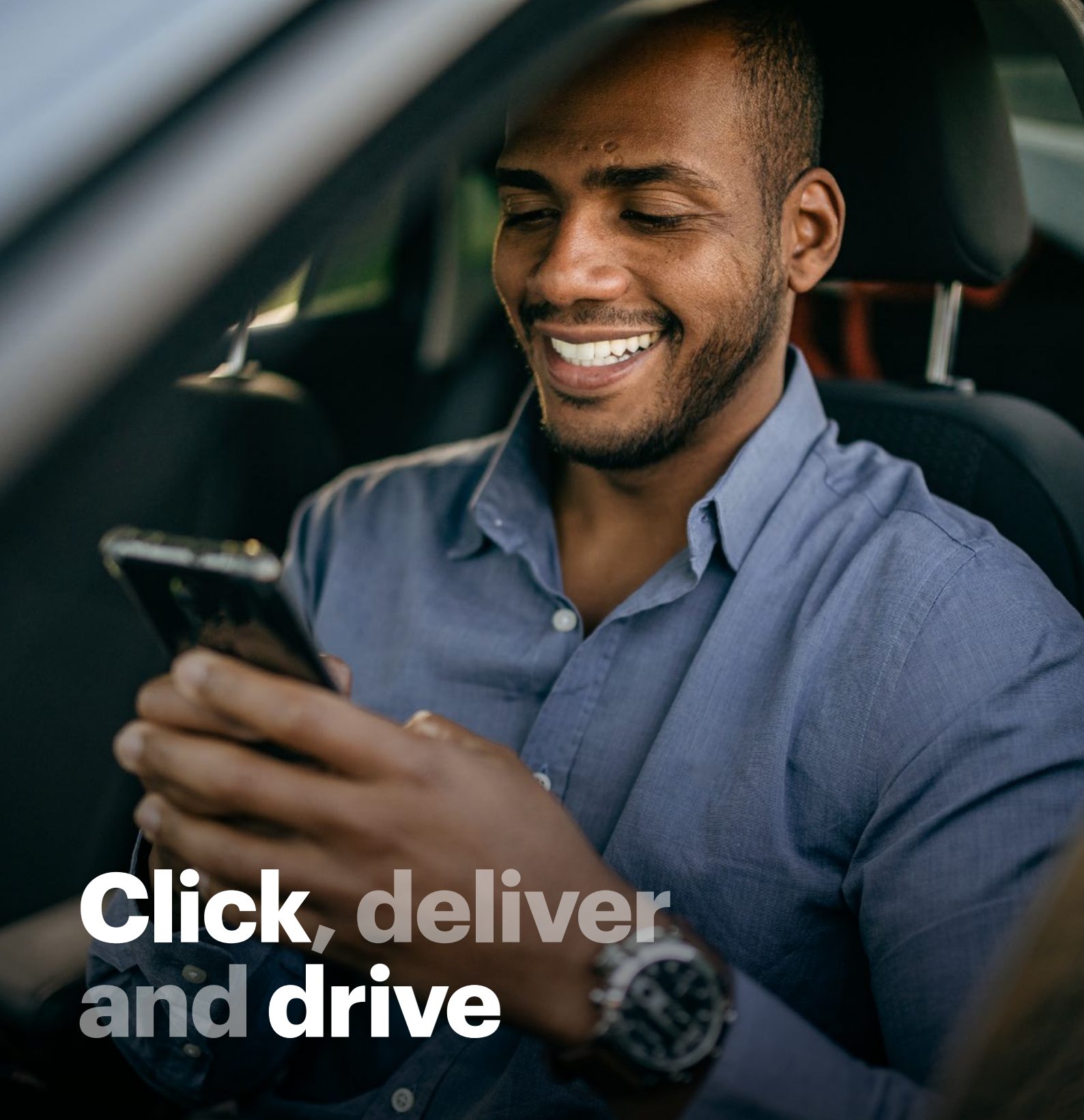
In-person future car purchase consideration

Global, by country

68% global In-person at a dealership
34% global In-person from an owner



Which of the following options would you consider purchasing for your next vehicle purchase?



Click, deliver and drive

Zooming in on digital approaches, car buyers are now faced with a range of digital choices when it comes to vehicle buying such as direct to the consumer via the car manufacturer who only sell online, or via online only car retailers. The pandemic saw the rise of a new breed of online used car retailers such as UK-based Cinch, and Carvana in the US that enable shoppers to buy, part exchange, and finance used vehicles from the comfort of their own home.

Tesla flipped car buying on its head by foregoing dealerships and selling its electric cars directly to customers, who can custom-order vehicles online and receive delivery to their doorsteps. In addition, many car manufacturers including Ford, Honda, Volkswagen etc., have transformed their digital offering to serve car buyers online, as well as in-person.

► [FIND OUT HOW OUR SOLUTIONS CAN HELP YOU](#)



Direct to consumer shake-up

Whilst many consumers still prefer to see, touch, and drive a car before buying, some consumers are wary of the face-to-face sales negotiating process, which is typically part of the in-person vehicle purchasing process. Buying online from a car manufacturer who operates in both the physical, and online space, allows car buyers to by-pass this. The pandemic has also accelerated the range of e-commerce solutions now available to car buyers, and the range of potential digital approaches to purchase varies significantly by region and country.

YouGov research reveals that Great Britain, US, India, and China register the highest proportion of car buyers who would consider buying from an online car manufacturer that offers both a physical, and online option. On the other hand, UAE, Hong Kong, and India, have the highest proportion of car buyers who would consider purchasing from an online only manufacturer such as Tesla.

► [SPEAK TO A RESEARCHER](#)

[Discover living data](#)

[Speak to sales](#)

[Launch a survey](#)

In-person future car purchase consideration

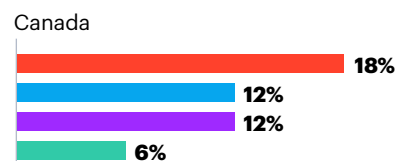
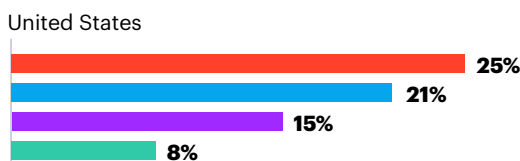
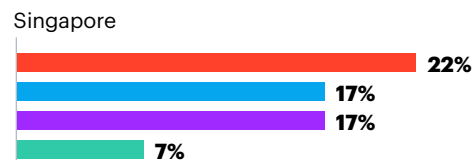
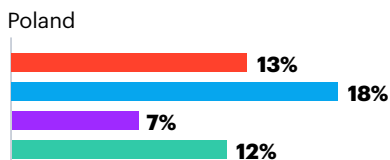
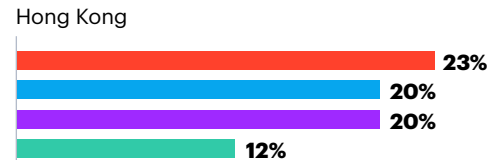
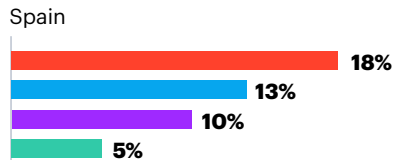
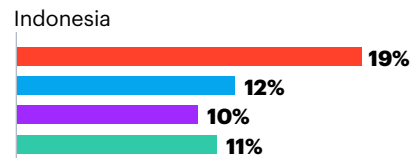
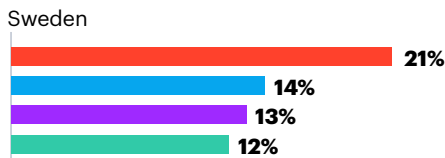
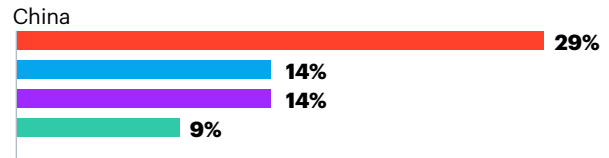
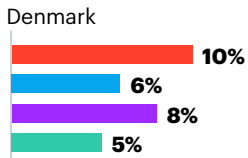
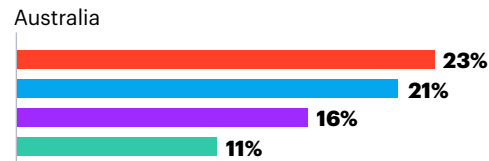
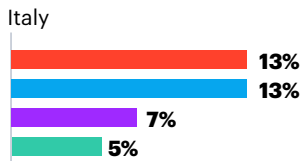
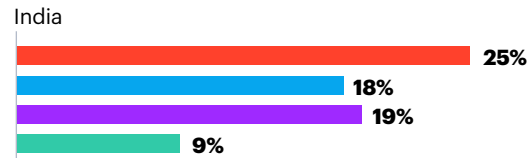
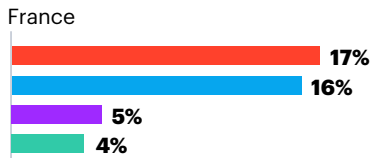
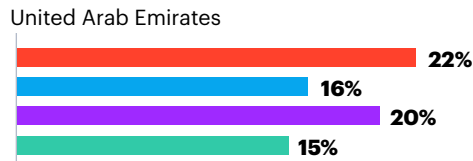
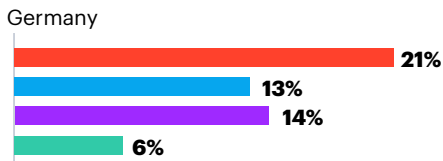
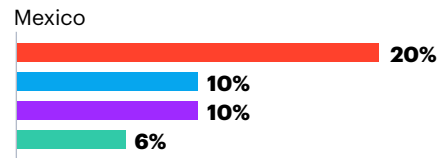
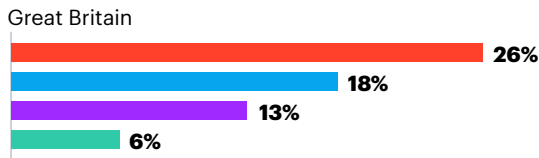
Global, by country

● Online from a car manufacturer who sells both online and in-person
21% global

● Online car retailers
15% global

● Online from a car manufacturer that only sells cars online
13% global

● Online auction site
8% global



Which of the following options would you consider purchasing for your next vehicle purchase?



Online car retailers appeal to Americans and Australians

In terms of e-commerce, used cars have been ahead of new cars in the transition to online sales, and more recently, the emergence of online used car disrupters such as Cinch, and Carvana in the US - offering customers the time saving benefits of buying online. Our research reveals that potential car buyers in Australia and the US score most highly for future vehicle purchase from a car retailer, closely followed by Hong Kong. Interestingly, the used car market in Australia has seen significant growth in recent years, potentially driven by an increase in the millennial population and the

growth of online buying options used vehicles – coupled with supply chain problems for new cars triggered by the pandemic, which significantly increased the average wait time for new car deliveries.

Whilst less than one in ten global car buyers are potentially considering purchasing their next vehicle from an online auction site, car buyers in UAE, Sweden, and Poland have a higher consideration for this route to purchase than other markets.

[Discover living data](#)

[Speak to sales](#)

[Launch a survey](#)



PART - 2

Car purchase drivers

In this next section we delve into the factors that are important when purchasing cars, and what drives choice. Whether car buyers are considering purchasing a new or used car, reviewing online or in-person options, what are the key factors that are important in deciding where to buy?

Price is key

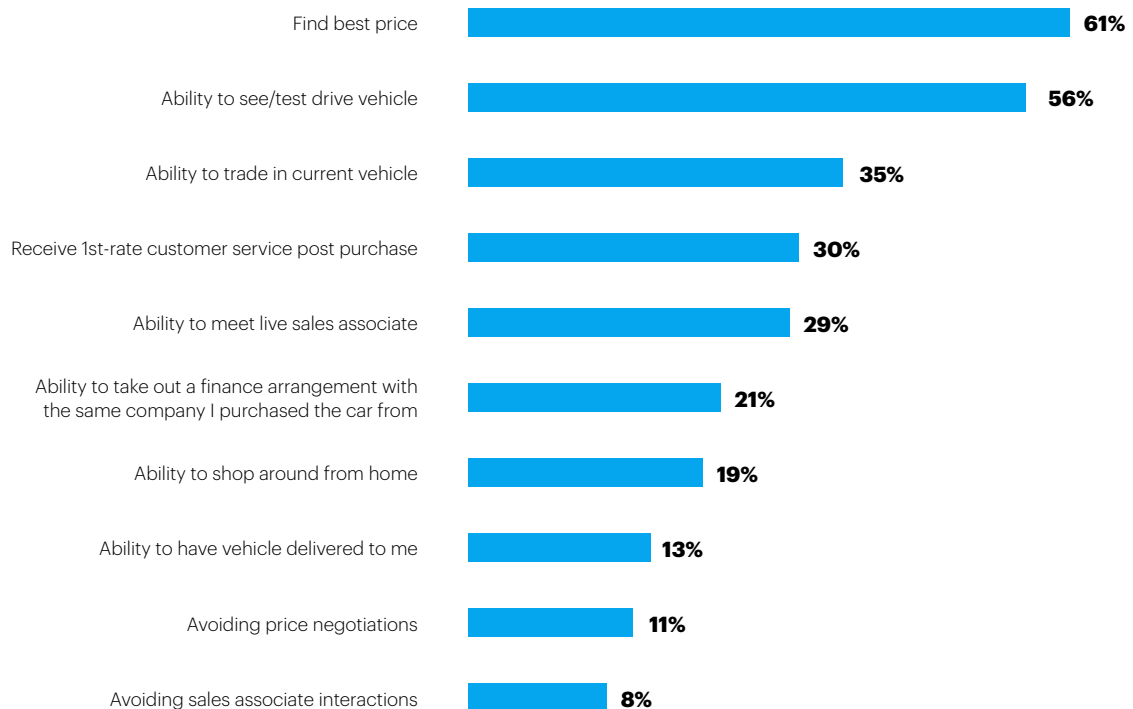
When considering vehicle purchases, our research reveals that finding the best price is the top influencing factor for more than six in ten future global car buyers, with the ability to see/test drive a vehicle before buying in second position (56%). Other financially motivated factors of importance are the ability to 'trade-in' current vehicle to receive money off the initial outlay (35%), and the ability to take out a finance arrangement with the same company they are buying from.

After-care service is deemed appealing to three in ten global car buyers and, whilst a similar proportion welcome the opportunity to deal with live sales associates, around one in ten would prefer to avoid price negotiations or interactions with sales.

[▶ EXPLORE MORE DATA](#)

Factors important in determining where to purchase future vehicle

Global



Thinking about your most recent, or your next vehicle purchase, which factors are important to you in determining where you purchase your vehicle?

When we explore car purchase drivers in more detail, YouGov data reveals some differences in priorities among those considering buying online, and those purchasing face-to-face.

Getting the best deal ranks top across all channels to purchase

When reviewing the factors of importance for future car buyers by purchasing methods, there is not a 'one size fits all' approach. However, finding the best price is the number one priority for all global potential car buyers irrelevant of the type of purchasing channel they are considering, although, price is slightly more important for those considering in-person transactions. In addition, given the considerable

outlay of buying a car, finance deals are also popular among a fifth of global car buyers, and those considering an online purchase from a car manufacturer are more interested in taking out a finance agreement with the same manufacturer than car buyers using other channels.

For some car buyers, the negotiation process and haggling for the best deal may seem part and parcel of the car buying experience, and our data shows that the ability to meet live sales associates is of greater importance for global car buyers opting for in-person methods of future vehicle purchase. On the other hand, the avoidance of salespeople and price negotiations is a higher priority for those considering online purchases, opting for a hassle free, more simplistic purchasing model.

[▶ LEARN MORE ABOUT OUR DATA](#)

Factors important in determining where to purchase future vehicle by future car purchase channel

	Global total	In-person at a dealership	In-person from an owner	Online Car retailers	Online from a car manufacturer such as Tesla or Polestar,	Online from a car manufacturer who sells both online and in-person	Online auction site
Find best price	61%	67%	69%	66%	57%	64%	57%
Ability to see/test drive vehicle	56%	64%	63%	56%	53%	59%	49%
Ability to trade in current vehicle	35%	41%	31%	37%	35%	39%	30%
Receive 1st-rate customer service post purchase	30%	34%	27%	31%	33%	35%	26%
Ability to meet live sales associate	29%	32%	31%	24%	23%	25%	26%
Ability to take out a finance arrangement with the same company I purchased the car from	21%	23%	20%	27%	30%	28%	25%
Ability to shop around from home	19%	20%	20%	33%	32%	30%	30%
Ability to have vehicle delivered to me	13%	12%	14%	26%	27%	23%	27%
Avoiding price negotiations	11%	10%	12%	20%	22%	19%	20%
Avoiding sales associate interactions	8%	7%	10%	17%	21%	15%	18%

Thinking about your next vehicle purchase, which factors are important to you in determining where you purchase your vehicle?



Many online car buying platforms show the price of the car alongside trade-in and finance options. This enables online car retailers to play on a level playing field with their physical counterparts without the face-to-face sales interaction, negotiations, and haggling on price that some car buyers dislike. In addition, to ensure trade-in deals are competitive, consumers can also use online comparison sites to get quick and easy valuations which reassure them that they are getting the best trade-in deal.

[Discover living data](#)

[Speak to sales](#)

[Launch a survey](#)



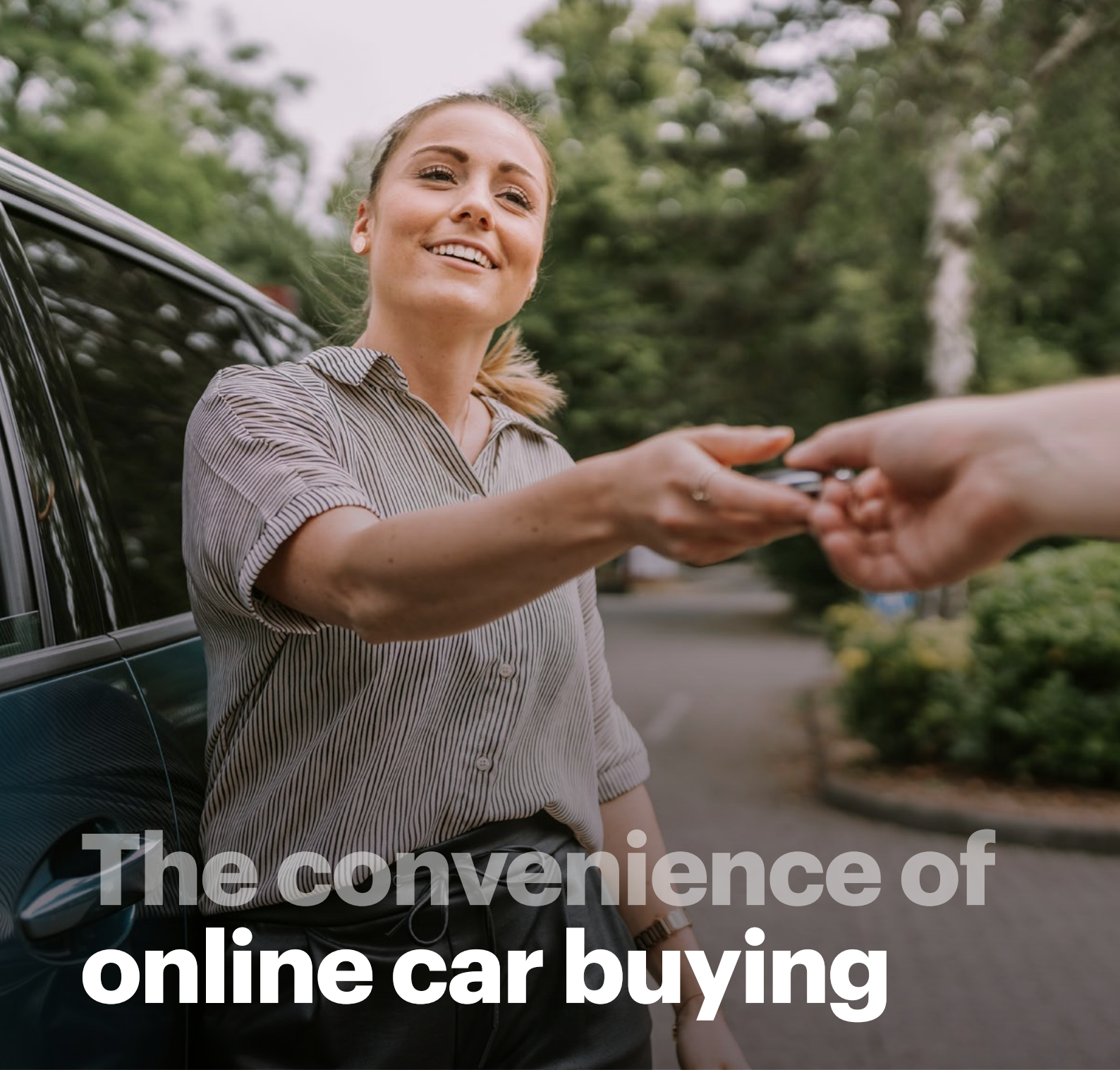
Drive before you buy

56% of global car buyers consider the test drive experience to be an important factor when considering their purchase.

Test driving is the second most popular priority behind price and rises to around six in ten among car buyers considering an in-person purchasing option.

Those considering purchasing their vehicle either online from a car manufacturer, an online car retailer, or an online auction are slightly less interested in a test drive. Nevertheless, to overcome the challenge of the 'test-drive' experience, some online auto groups are offering 'trial ownership' arrangements, offering buying a period to try out the car, along with an easy returns process.

► [FIND OUT HOW OUR SOLUTIONS CAN HELP YOU](#)



The convenience of online car buying

Online car platforms offer the flexibility for consumers to buy a car from the comfort of their own home, and YouGov data shows that future global car buyers considering online purchasing methods are more attracted by convenience than those selecting face-to-face approaches. A significantly higher proportion of car buyers considering using online car retailers, purchasing online from a car manufacturer, or online auction site are more likely to prioritise factors such as the

ability to shop around from home, and the ability to have their vehicle delivered to the door than consumers selecting face-to-face purchasing options.

Whilst we are seeing growing interest in car buyers embracing the digital path to purchase some are still holding back. What are global consumers' attitudes to online car retailers?

[Discover living data](#)

[Speak to sales](#)

[Launch a survey](#)



The education challenge

Across the 18 international markets surveyed, there is a low level of understanding of online car purchasing options among global consumers, with almost half (**49%**) agreeing that they don't know enough about online car retailers and manufacturers. Significantly, despite the higher levels of use of online car purchasing options among younger generations, they are equally as unfamiliar with their

knowledge of online car retailers and manufacturers as some of their older counterparts. This, however, presents an opportunity for online car platforms to build awareness, and communicate their offering to a wider audience.

► [SPEAK TO A RESEARCHER](#)

Agreement with statement: "I don't know enough about online car retailers or manufacturers"						
	Global total	18-24	25-34	35-44	45-54	55+
Strongly agree	20%	19%	18%	18%	18%	25%
Slightly agree	29%	32%	31%	29%	28%	26%
Neither agree nor disagree	29%	26%	29%	32%	30%	27%
Slightly disagree	9%	9%	9%	9%	9%	8%
Strongly disagree	5%	5%	4%	5%	6%	5%

How much do you agree with the following statement about buying cars online either through an online retailer or manufacturer?



The trust challenge

Whilst we have seen there is an opportunity to increase consumers knowledge and understanding of online car retailers or manufacturers across the globe, there is also a trust challenge to overcome. **39%** of global consumers agree that they don't trust online car retailers or manufacturers (with only 15% disagreeing with this statement) and a third unsure.

Significantly, whilst younger future car buyers are more likely to consider purchasing their next vehicle online, our research indicates that levels of trust in online car retailers

among global consumers remains low across all age groups. This may be because online options are newer and less familiar, but the online car sector has a challenge ahead to build this trust and consumer confidence across the globe, particularly among younger generations - the future audience for the automotive industry.

[▶ EXPLORE MORE DATA](#)

Agreement with statement: "I don't trust online car retailers or manufacturers"						
	Global total	18-24	25-34	35-44	45-54	55+
Strongly agree	14%	11%	12%	13%	15%	18%
Slightly agree	25%	26%	27%	26%	23%	24%
Neither agree nor disagree	36%	35%	36%	37%	37%	34%
Slightly disagree	10%	13%	12%	11%	11%	8%
Strongly disagree	5%	5%	4%	4%	5%	5%
Don't know	10%	10%	9%	9%	9%	11%

How much do you agree with the following statement about buying cars online either through an online retailer or manufacturer?

As global consumers become more open to buying online, brand marketers need to focus on creating more knowledge, communicating the enhanced customer experience and build brand trust to fully convert to the online path to purchase.

As automotive retailing becomes a more omnichannel experience, it is important that businesses consider how their methods of communication address the needs and expectations of individual customers.



PART - 3

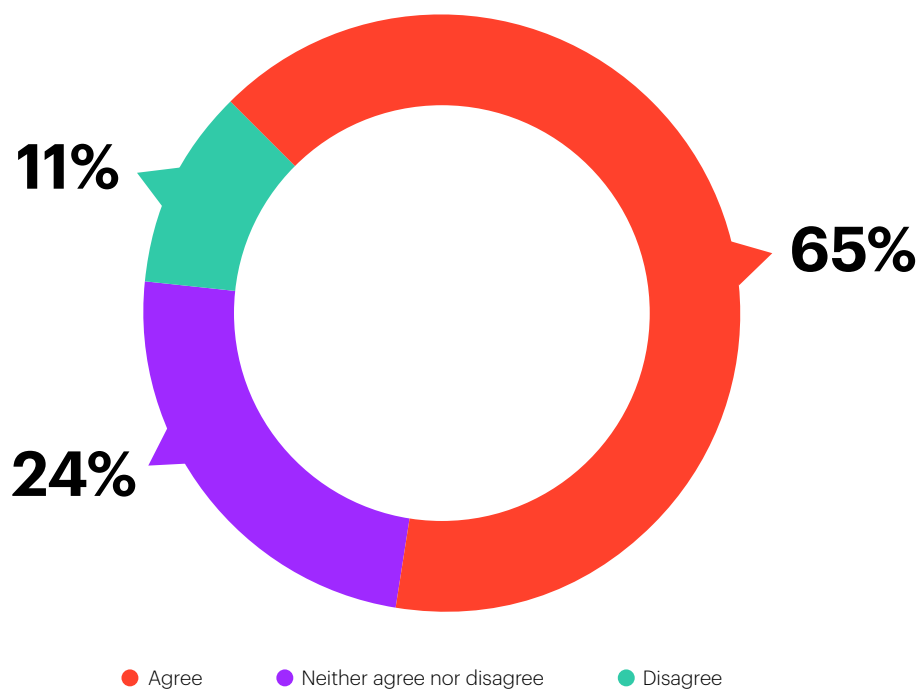
The E-volution

Despite the impact of the pandemic on the automotive market, the EV sector has continued to grow. The world is moving full force towards electrification,

OEMs have invested billions to deliver new electrified models, from R&D to factory redesign. Consumer attitudes have evolved, and demand for efficient and low emission vehicles is increasing. **YouGov Global Profiles** data reveals that almost two thirds (**65%**) of global consumers agree that the future vehicle industry is electrification, only a small **11%** disagree.



Level of agreement with the statement 'Electric cars are the future of the motor industry'



Exploring attitudes towards the future electrification of the vehicle industry by different markets, YouGov Global Profiles data highlights that Asian markets have the highest

agreement with the statement reaching to almost eight in ten for Indonesia and over seven in ten in India, Singapore and Hong Kong, along with Mexico.

► **FIND OUT HOW OUR SOLUTIONS CAN HELP YOU**

Discover living data

Speak to sales

Launch a survey

Net agreement with the statement 'Electric cars are the future of the motor industry'

By country

● Agree

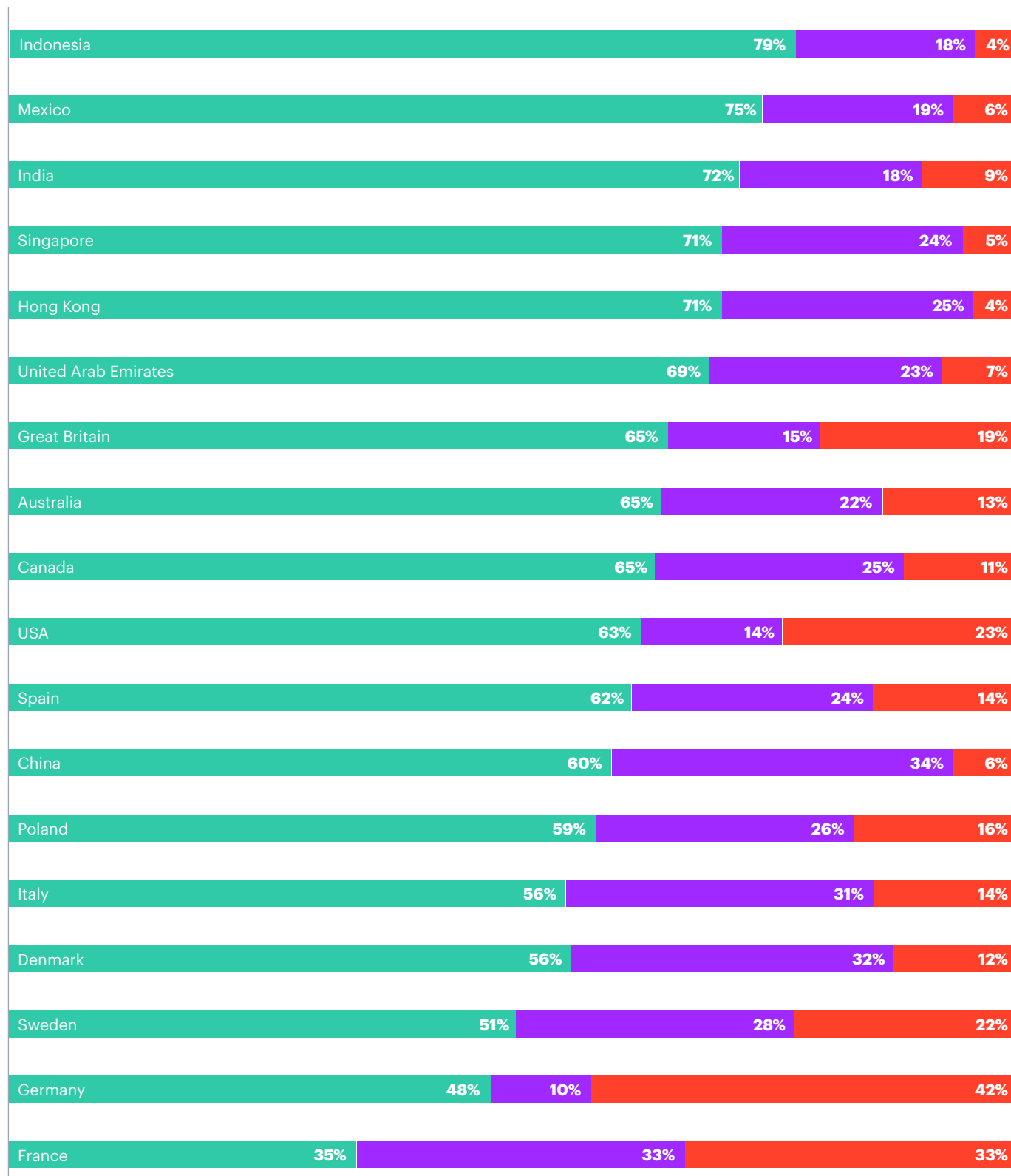
65% global

● Neither agree nor disagree

24% global

● Disagree

11% global



How much do you agree with the following statement about buying cars online either through an online retailer or manufacturer?

Focus on E-luxury

There is also growing interest in premium branded EVs, capitalising on the segment carved out by Tesla. Large, established, luxury automotive manufacturers and newer premium specialists are also competing to be at the forefront of this growing sector. Almost every major brand and luxury car specialist have now committed to making electric cars, whilst keeping their prestige appeal; whether it's the styling, interiors, performance, or a combination of all three.

Using **YouGov BrandIndex** data to measure which car brands have customers buzzing in the automotive sector in the UK, we can see that Tesla ranks as the number one brand for Buzz among under 44's. Amongst 45-54 year olds, Tesla drops back to 8th position, and falls out of the top ten to 23rd amongst the over 55's.



Car brands with the biggest Buzz score - UK



YouGov Brand Index, UK, Jan-Dec'21

Buzz is a measure of whether consumers have heard positive things about a brand in the last two weeks. The score can range from 100 to -100 and is compiled by subtracting negative feedback from positive. A zero score means equal positive and negative feedback. It is just one of 16 brand health metrics continuously tracked by YouGov BrandIndex across thousands of brands and hundreds of sectors, globally, with historical data ranging back over 15 years.



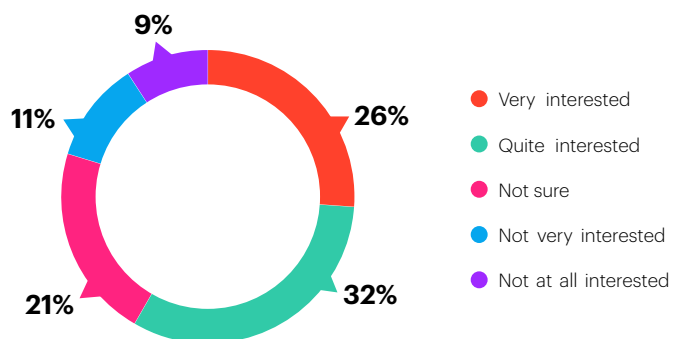
Whilst Tesla has created a buzz in the industry, YouGov research explores the global appetite for buying luxury and premium EVs across the 18 international markets, and the core drivers for buying luxury/premium electric vehicles.

More than half globally are interested in buying an electric luxury or premium car.

YouGov data identified that over a fifth (**22%**) of global consumers currently own a luxury or premium car*. Almost six in ten (**59%**) luxury or premium car owners globally would be interested in buying a luxury/premium EV model, and a quarter would be very interested.

*Luxury and Premium car buyers are defined as; Luxury cars defined as: Bentley, Rolls Royce, Bugatti, Ferrari, Lamborghini, Aston Martin, Maserati, McLaren, Porsche and Jaguar E-Type. Premium cars defined as: Mercedes-Benz, Lexus, JLR, BMW, Tesla, Audi, and Volvo.

Interest in buying a luxury/premium electric vehicle



How interested would you be in being able to buy an electric vehicle luxury/premium car? Based on Luxury and Premium Car owners?*

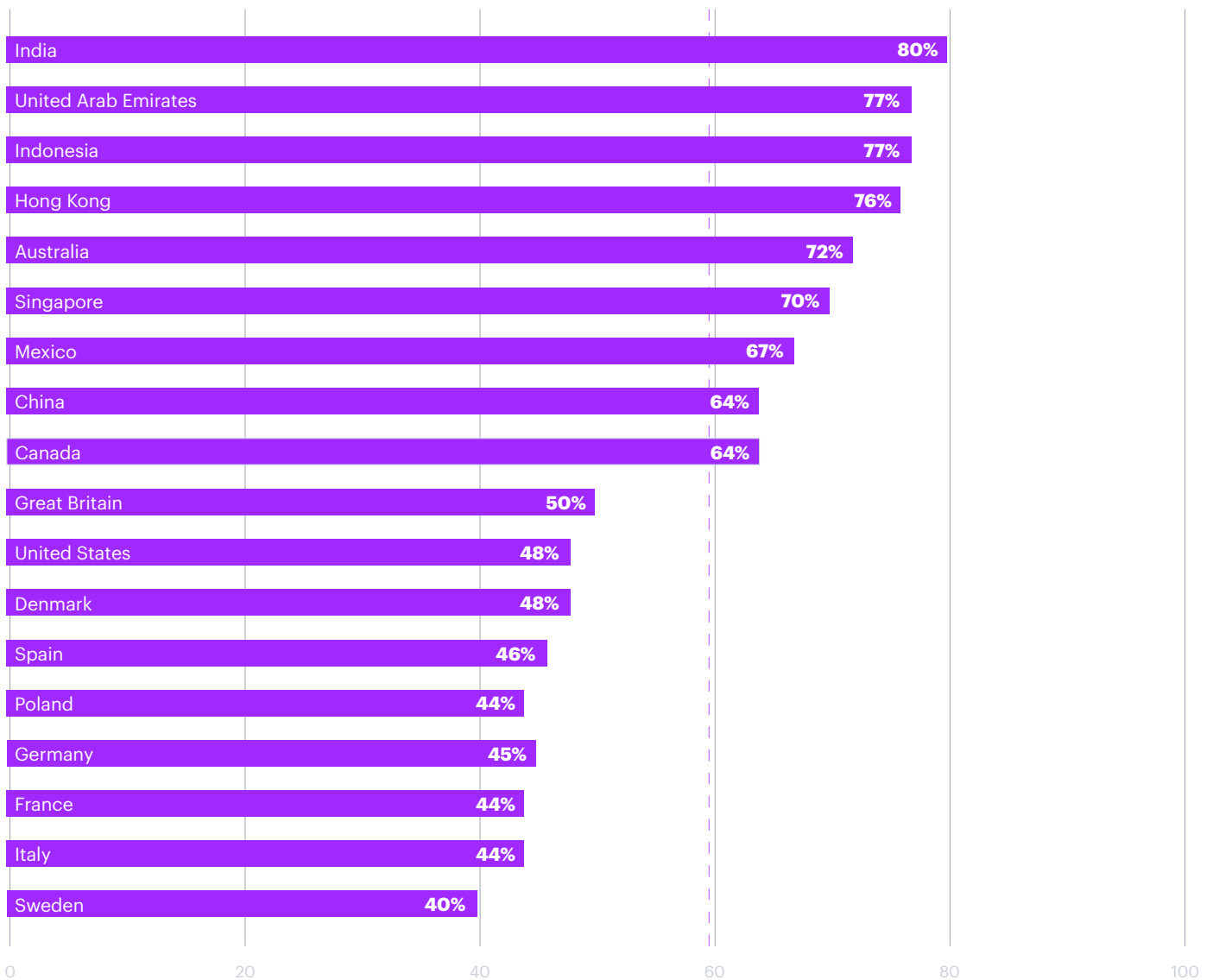
Turning to countries with the highest level of interest in buying an electric luxury/premium vehicle, we see that **UAE, and the Asia markets, register the highest level of interest** amongst existing luxury/premium car owners.



% Interested (very/quite) in buying a luxury/premium electric vehicle

By country

59% global



*How interested would you be in being able to buy an electric vehicle luxury/premium car?
Based on Luxury and Premium Car buyers**



Lower running costs and the environmental impact drive interest in luxury/premium EVs

Looking at the reasons why luxury or premium car owners would be interested in buying a top of the range EV, the highest scoring motivations are centred around the reduced cost of fuel (**39%**), and protecting the environment (**38%**), followed by future proofing and lower running costs (both registering interest among a third of luxury or premium car owners).

Being at the forefront of change in terms of interest in the latest technology, and vehicle design are also appealing EV attributes for around three high end car owners.

► [SPEAK TO A RESEARCHER](#)

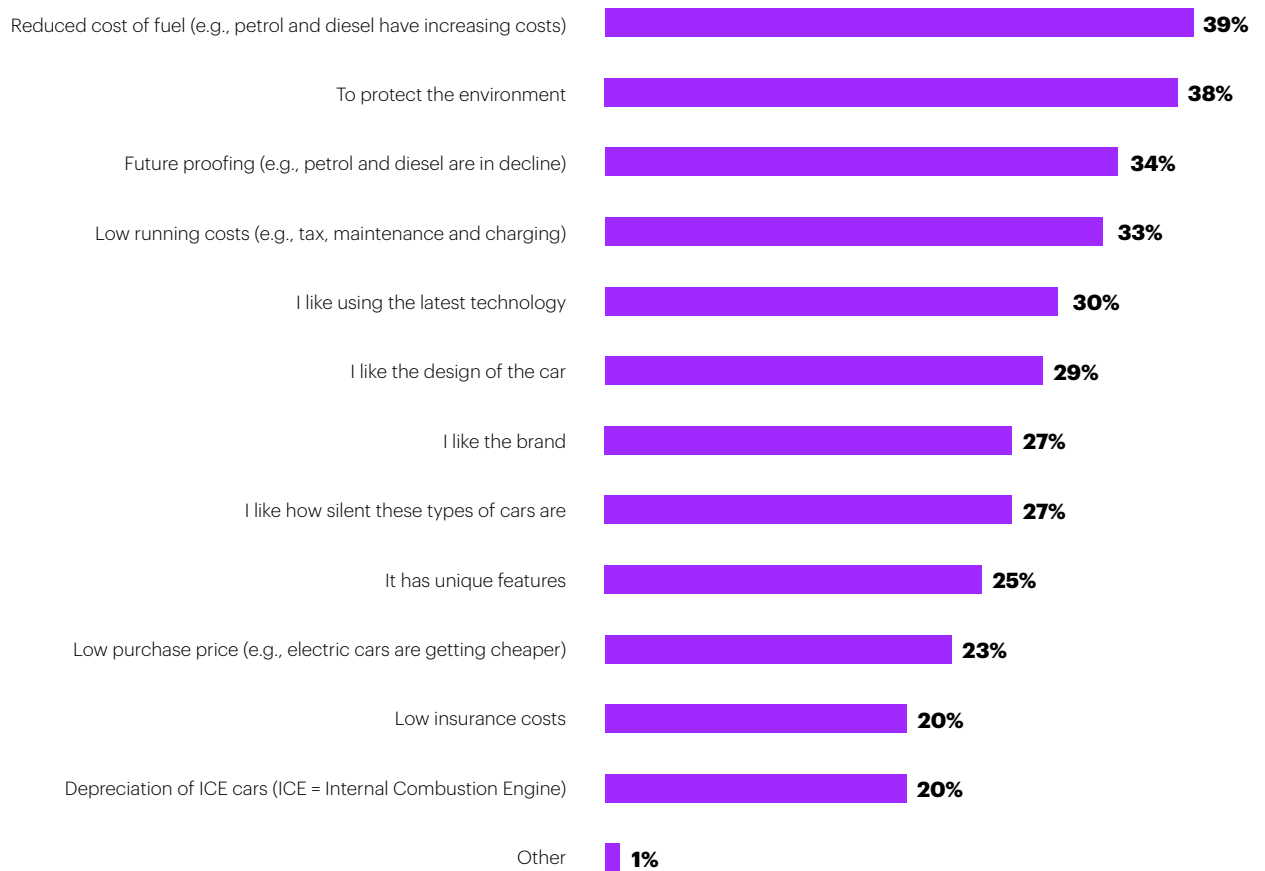
[Discover living data](#)

[Speak to sales](#)

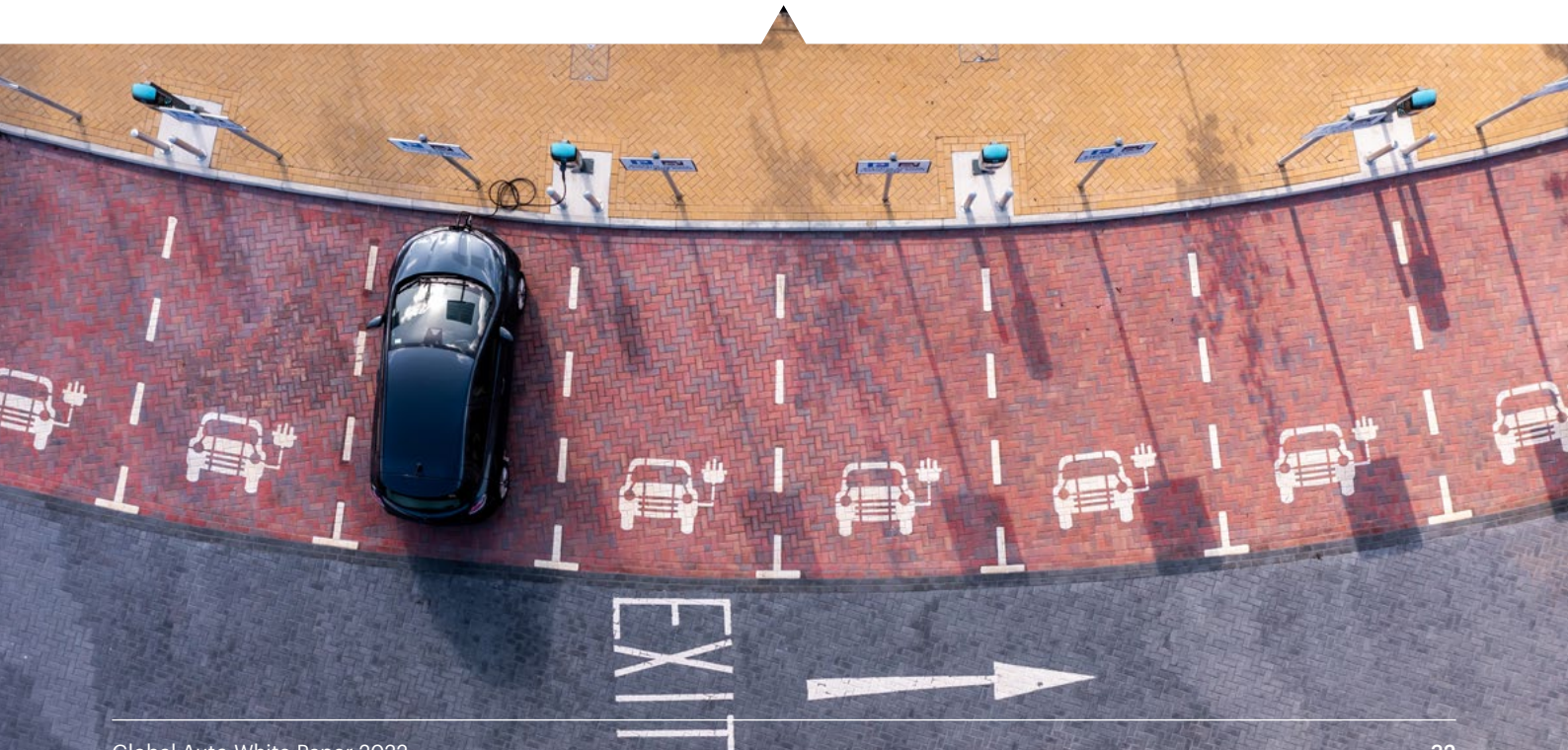
[Launch a survey](#)

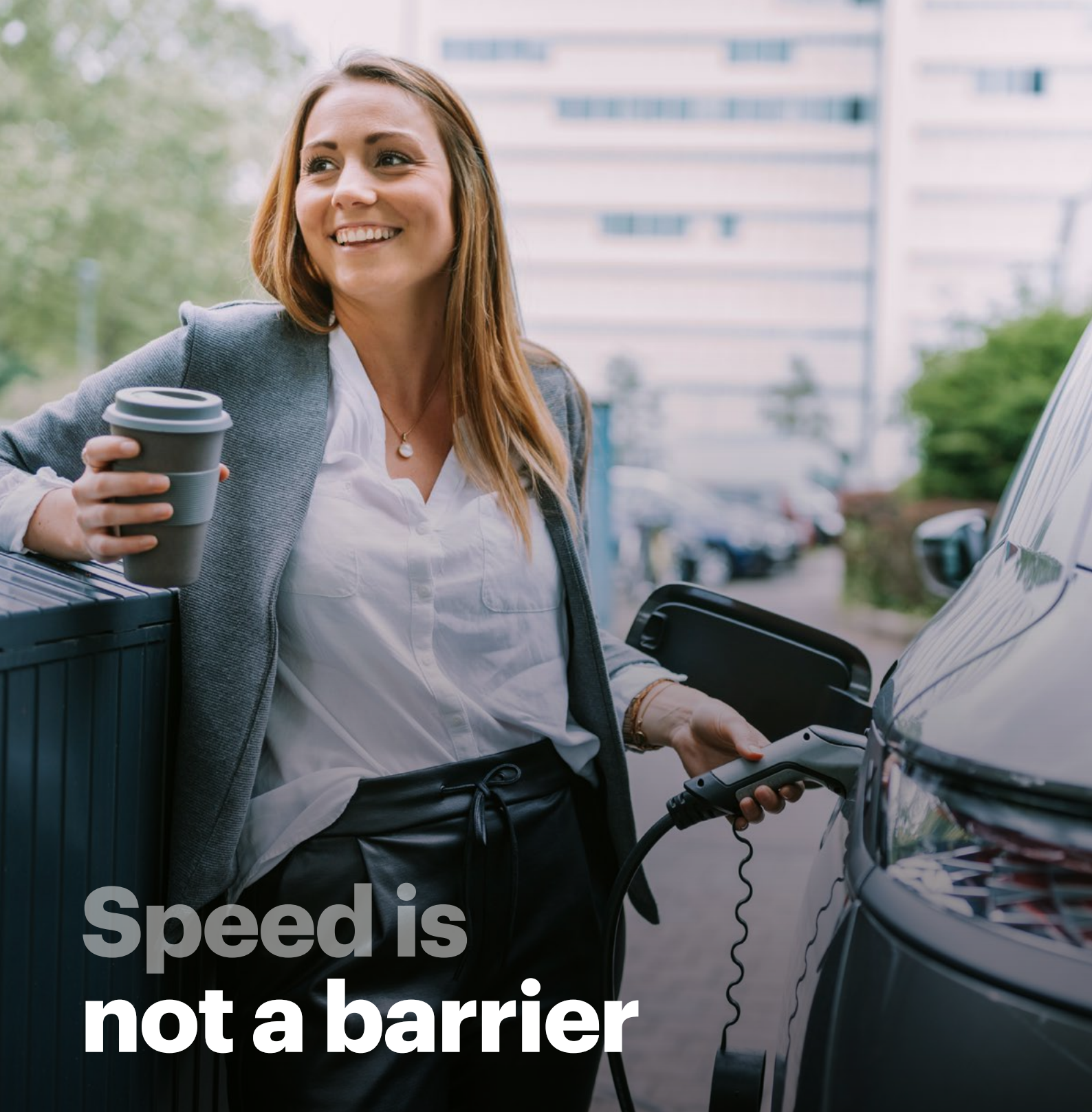
Reasons interested in buying a luxury/premium EV car amongst existing luxury/premium car buyers

Global



Why are you interested in being able to buy an electric vehicle luxury/premium car? Please select all that apply.
Based on Luxury and Premium Car owners interested in buying a luxury/premium EV car.





Speed is not a barrier

Interest in buying a luxury or premium EV among high end car owners (**59%**) outweighs those uninterested (**20%**) three times to one. Of those who are not interested, the lack of charging points and initial cost rank as the top barriers to purchase. Other challenges to the adoption of luxury/

premium EVs among top of the range car owners are highly charged, with more than three in ten stating the charging time, longevity of battery and the hassle involved in charging. This suggests that a better charging infrastructure could eliminate this as a barrier.

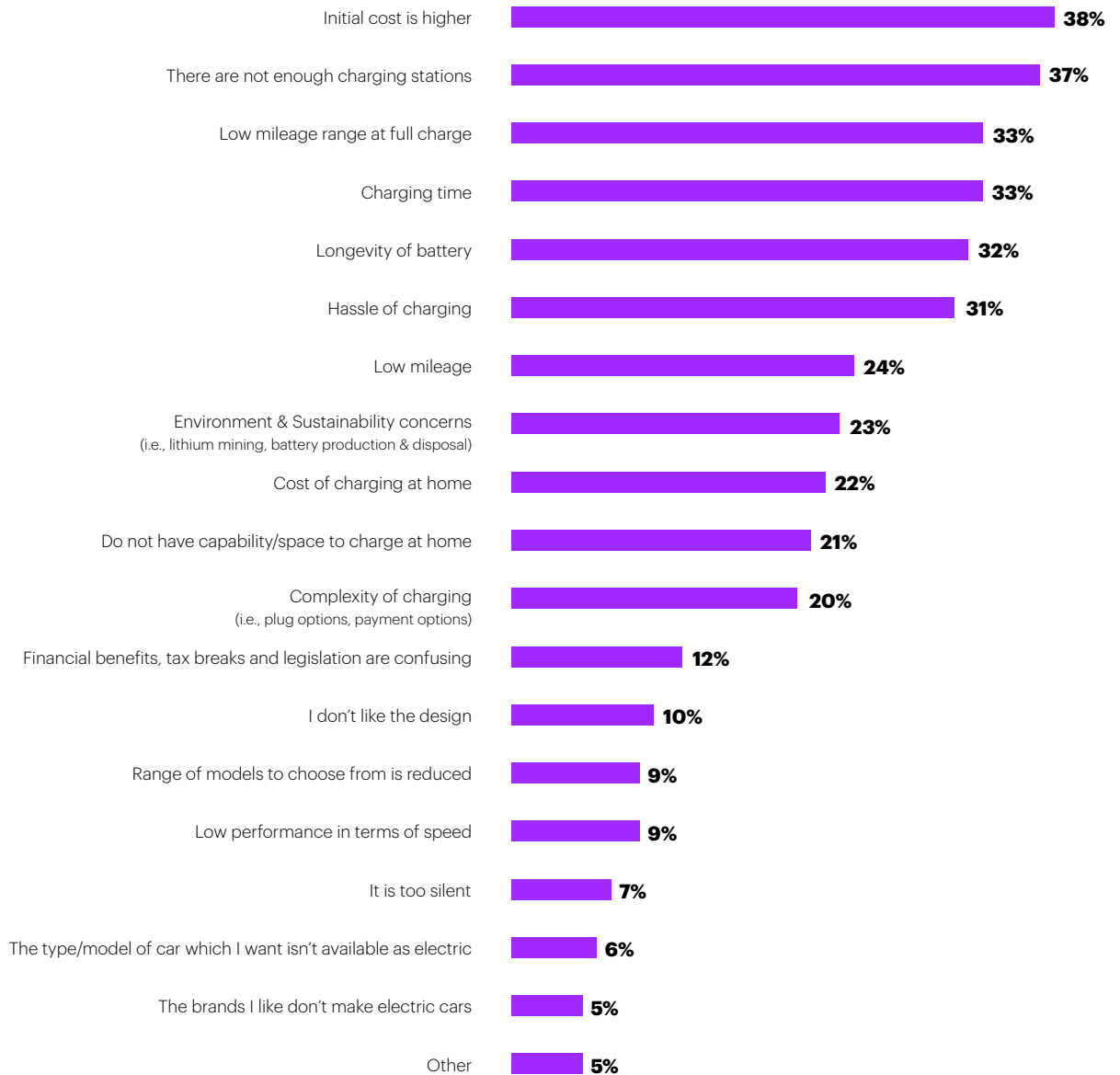
[Discover living data](#)

[Speak to sales](#)

[Launch a survey](#)

Top reasons not interested in buying a luxury/premium car amongst existing luxury/premium car buyers

Global



Why are you not interested in being able to buy an electric vehicle luxury/premium car?

Based on Luxury and Premium Car buyers not interested in buying a luxury/premium EV car.



Only around one in ten state the design, range of models and the low performance as barriers to not buying electric luxury/premium vehicles. Given electric vehicles have an instant torque, more horsepower, and generally have a quicker 0-100km/h acceleration, speed is not seen as a barrier to buying electric luxury/premium vehicles.

[▶ LEARN MORE ABOUT OUR DATA](#)

As governments across the world tighten their emissions, regulation will clearly be a key driver towards EV in the luxury and premium car market. At COP26, several major countries and automakers agreed to set a new goal to go all-electric by 2040. Luxury OEM's such as Land Rover, Jaguar, Maserati and Alfa Romeo are all at different stages of moving toward electrification.

[Discover living data](#)

[Speak to sales](#)

[Launch a survey](#)

Summary

1 The rise of digital purchasing options for both new and used cars transformed the automotive industry during the pandemic.

Whilst in-person car purchasing via a dealership or a private owner remains the preferred option for past and future purchasing, global car buyers are increasingly exploring digital channels.

2 Younger generations are more receptive to digital car purchasing solutions.

But global consumers across all age groups don't know enough about the online purchasing options available, suggesting an educational need for potential car buyers, and an opportunity for online auto retailers and manufacturers to clearly communicate, and promote the benefits and processes of purchasing online.

3 Today's car buying process is becoming increasingly complex and varied.

Purchasing considerations not only include visits to dealerships, test drives, and face-to-face interactions, but also a range of digital alternatives including buying directly online from car manufacturers, online car retailers, or online auction sites. These digital experiences offer consumers convenience, price benefits, and a hassle-free purchasing process, all from the comfort of their own home.

4 As the car buying process becomes a more omnichannel experience...

It is important that automotive organizations continue to track consumer attitudes and purchasing behaviour across the regions and consider how communication methods and messages address the changing needs and expectations of consumers.

5 Interest in purchasing luxury/premium EV cars is high among global high end car owners.

Key appeal factors centre on reduced fuel costs and protecting the environment. Main objections for purchasing EV cars include price and battery issues; including lack of available charging infrastructure, low driving range, charging time, battery longevity, and the hassle involved in the charging process. Reducing charging time and adding technology features to luxury EVs would act as core factors for faster luxury/premium EV market growth.

Methodology

The insights in this report are drawn from a recent global Custom Research survey uncovering how car purchase behaviour and channels are evolving, the drivers to car purchase and the interest and appetite for electrification in the luxury and premium global auto market. The study covers 18 global markets of more than 19,000 respondents. Our survey results were further bolstered by connecting research from our syndicated surveys **YouGov Global Profiles** and **BrandIndex**. Our survey was fielded the week of 6th to 22nd July 2022. The YouGov panel provides a naturally accurate and representative view of the population. Data is adjusted using a mild weighting team using interlocking demographic characteristics—methodology considered advanced in the market research space. For this report series the following population representation was used:

Region	Market	Population sampled representation	Sample Size (n=)
North America	US	Nat Rep - 18 years of age +	1,662
North America	Canada	Nat Rep - 18+	1,011
North America	Mexico	National (Urban focus) - 18+	1,109
Europe	GB	Nat Rep - 18+	2,004
Europe	France	Nat Rep - 18+	1,003
Europe	Germany	Nat Rep - 18+	1,063
Europe	Spain	Nat Rep - 18+	1,004
Europe	Denmark	Nat Rep - 18+	1,009
Europe	Italy	Nat Rep - 18+	1,008
Europe	Poland	Nat Rep - 18+	1,005
Europe	Sweden	Nat Rep - 18+	1,018
APAC	Australia	Nat Rep - 16+	1,091
APAC	China	National Online - 16+	1,033
APAC	Hong Kong	National Online - 18+	514
APAC	Indonesia	National Online - 18+	1,100
APAC	India	National Online (Urban only) - 18+	1,073
APAC	Singapore	Nat Rep - 18+	1,054
MENA	UAE	Nat Rep - 18+	1,117

For further information or for any questions about the data used in this report, please **get in touch**.

[Speak to sales](#)

[Launch a survey](#)

Thank you

YouGov is an international research, data and analytics group. We have been building an ever-growing source of consumer data for over **20** years, creating the richest and most complete understanding of your customers' complex lives. We call it living data. Understand what **20 million+** registered panel members in over 55 markets are thinking, on over a million - and growing - data points. Re-Contact and dig deeper to explore, plan, activate and track marketing activity with certainty, at speed, every time.

Living Consumer Intelligence.

2022 YouGov PLC. All Rights Reserved

yougov.com/automotive

YouGov, 2022, all rights reserved. All materials contained herein are protected by copyright laws. Any storage, reproduction or distribution of such materials, in whole or in part, in any form without the prior written permission of YouGov is prohibited. This information (including any enclosures and attachments) is propriety and confidential and has been prepared for the exclusive use and benefit of the addressee(s) and solely for the purpose for which it is provided. We make no representations, warranties or guarantees, whether express or implied, that the information is accurate, complete or up to date. We exclude all implied conditions, warranties, representations or other terms that may apply and we will not be liable to you for any loss or damage, whether in contract, tort (including negligence), breach of statutory duty, or otherwise, even if foreseeable, arising under or in connection with use of or reliance on the information. We do not exclude or limit in any way our liability to you where it would be unlawful to do so.