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INTERNATIONAL AUTOMOTIVE REPORT 2021

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Contents



• Foreword	3
• Section I: Behavioral Shifts in Mobility & Transportation	4
• Executive Summary	
• Overview & Analysis	
• Future Perspective	
• Section II: The Road to an Omni-Channel Automotive Path to Purchase	18
• Executive Summary	
• Overview & Analysis	
• Future Perspective	
• Methodology	33

Foreword

The automotive and mobility sector is going through a period of transformation, accelerated by digitalization enablement. Increasing introduction of environmental regulations have led to greater production of non-fossil fuel vehicles and shifts in car ownership attitudes and behaviors among consumers.

This digital transformation has also changed the traditional car manufacturing industry into one that now includes strategic alliances with tech startup companies or parts of their business operating as digital companies.

The mobility subscription, mobility on demand and car shared ownership are new business models which have emerged in recent years.

Our international report into the sector for 2021 reveals that, in the 17 markets featured in our study, a plurality of consumers say that they have altered their behaviors and that their shopping preferences have changed over the last year.

Using syndicated survey data from [YouGov Profiles](#) and [YouGov BrandIndex](#) in tandem with deep-dive [YouGov Custom Research](#), this report investigates how consumer attitudes have shifted, and which categories have changed as a result. It also provides an overview of mobility behaviors and examines the relationship between the mobility and traditional automotive sector, examining what we should expect moving forward in a post-pandemic world.



Suzanna Mitrovich
Global Sector Head,
Automotive, YouGov



Section 1:

Behavioural shifts in mobility & transportation

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Executive Summary



Main findings

- Majority of people who buy and drive their own vehicle expect no change in the need for a personal vehicle (59%).
- The youngest group (18-24 years) has the highest consideration for a wider range of mobility options.
- Personal vehicle usage in emerging markets will increase with consumers seeking options with safer personal space.
- In Europe and the US there is less demand for transportation with the lifestyle change of working from home, resulting in expected lower usage over the next 12 months.
- Intent to use public transportation substantially less in emerging markets (India, Indonesia and Mexico) will have a major impact on the environment, traffic congestion and infrastructure in metropolitan urban areas in these countries.
- Ride-hailing, as transportation option, requires service providers to alleviate the customer concerns about the vehicles' safety and cleanliness.
- China is a leader in adoption of the car sharing services and the only country with the strong consumers' intention to use of these services in the future.



Behavioral Shifts In Mobility & Transportation

The mobility industry has experienced constant disruptions for more than a decade. Improvements in bandwidth, smartphone devices, and other technological and digital advancements have spawned entire industries of mobility (ridesharing, ride-hailing, shared vehicle apps, micro mobility, etc.) and have vastly improved existing infrastructure for public services such as bus and train networks.

New mobility players are driving customer-centric solutions, with the emphasis on the user-friendly customer journey. Mobility and transportation is not only influenced by the traditional and new providers, but also by social media.

Development trends in mobility and transportation have been impacted by the COVID-19 pandemic which will further shape the mobility industry. The awareness of personal space safety was not a concern prior to 2020. These safety concerns require mobility and transportation providers to be fast and fearless in making changes to the mobility industry to meet evolving customer needs and behaviors.



The impact of COVID-19 on consumer driving behavior



Behavioral dynamics have affected how people across the globe buy and drive their own vehicles, as well as their intentions for the future.

How did COVID-19 impact how people used their cars? YouGov global consumer data revealed driving behavior was drastically impacted as a result of the pandemic.

Behavioral changes from consumers such as postponed plans, revised budgets, and different model preferences have been seismic and naturally altered the way they see and use mobility. The work-from-home world and a general reduction in social interactions have re-shaped how consumers move and how often we move.

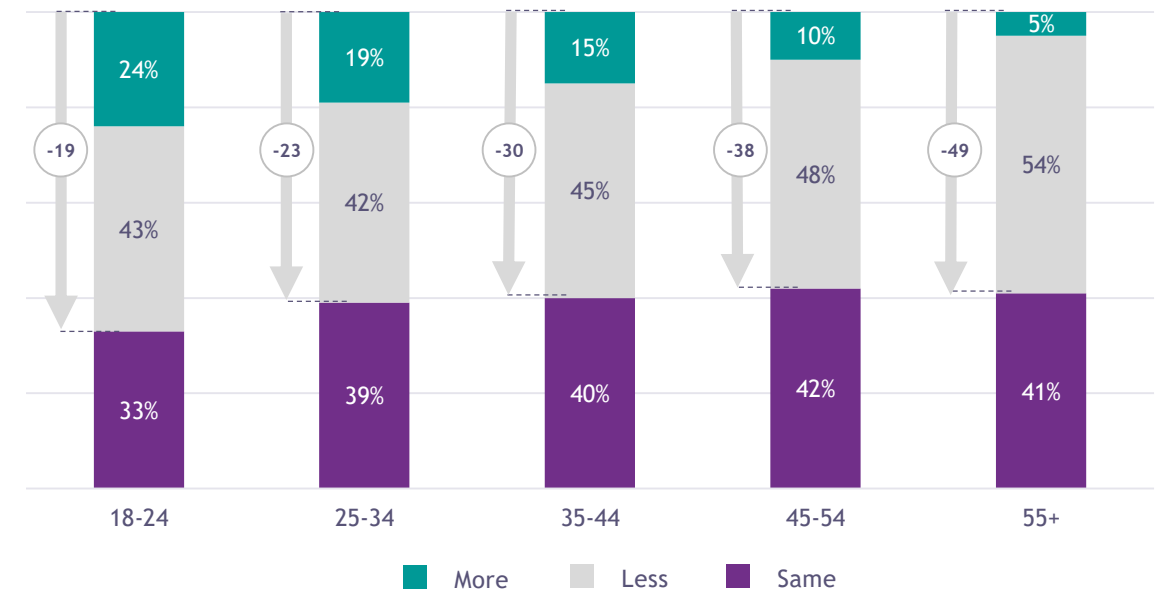
Ridesharing was hit particularly hard, as people opted to take alternative forms of transportation that allowed them to socially distance themselves and protect their personal safety space. Shared vehicles as a platform will require new user acquisition to sustain hyper growth, yet they are still in the early adoption phase in many markets and consumer sentiment toward this service has been impacted by COVID-19.

Globally, nearly 5 in 10 of those surveyed across 17 key markets claimed they drove less. This was most pronounced among the oldest cohort, with the percent impacted increasing among every sequential age cohort. Less driving across the board had several unintended positive and negative consequences.

Behaviors were disrupted, and we anticipate some of these new behaviors will persist into the future. This paper will explore the implications of this for other modes of transportation, driving behavior, and car purchase behavior moving forward.

Average across global markets - Impact on driving during the pandemic - % of drivers

Compared to pre-pandemic times, how much are you currently driving?



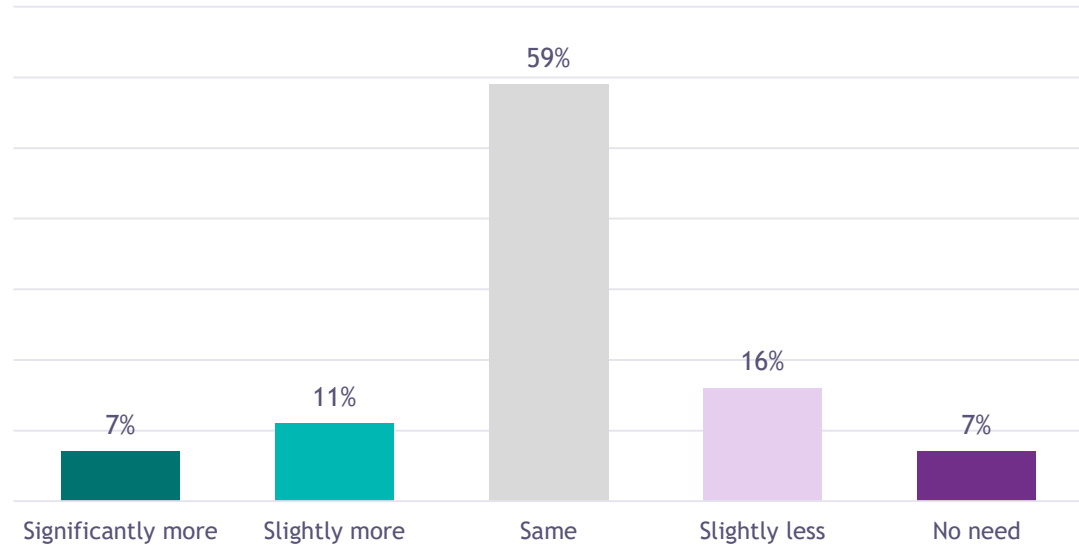
The perceived need for a personal vehicle is present but decreasing



With some economies gathering steam, the auto industry will be looking to make good on the shortfall in sales that it saw in 2020. But how big is demand and what do motorists’ intentions look like in 2021?

The greatest proportion of respondents (59%) surveyed stated no change in their need for a personal vehicle. Whether it is a matter of convenience, safety, or otherwise, people still plan to have a personal vehicle. A third (32%) stated a lesser or no need for a personal vehicle.

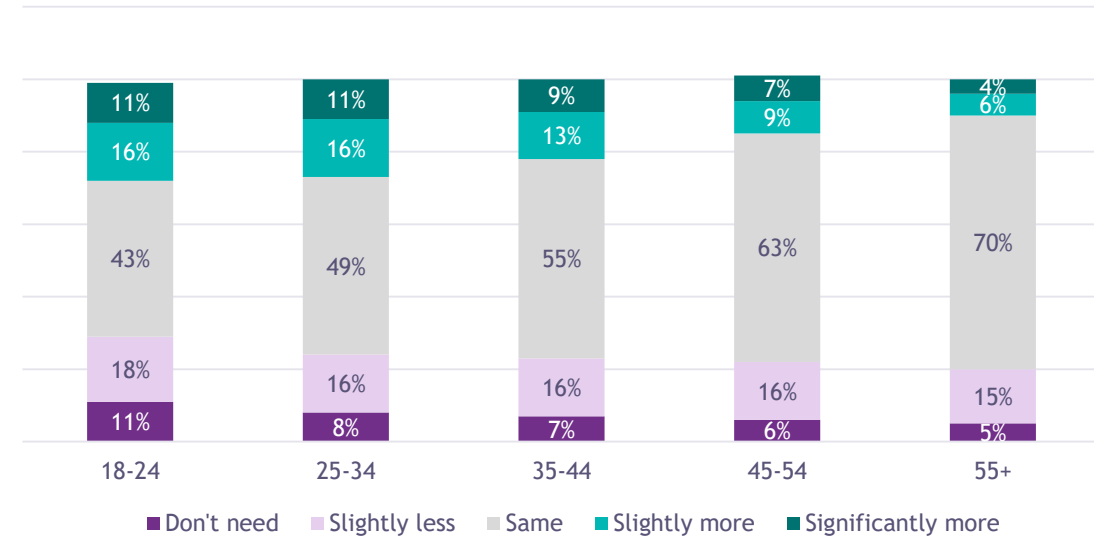
Average across global markets - Stated need for a personal vehicle - % avg
How has your need for a personal vehicle changed in the past year?



This bodes well for the automotive industry, but the new set of motivations for a personal vehicle will be important to consider as business managers think through product design, promotional activity, range, and flexibility of mobility options.

There is also a relationship between age and perceived need. The youngest age group perceives slightly less need for a personal vehicle than the oldest age group. The youngest group, as we will see, considers a wider range of options for their personal vehicle needs.

Average across global markets - Stated need for a personal vehicle - % by age
How has your need for a personal vehicle changed in the past year?



The future of mobility: movement toward personal vehicles

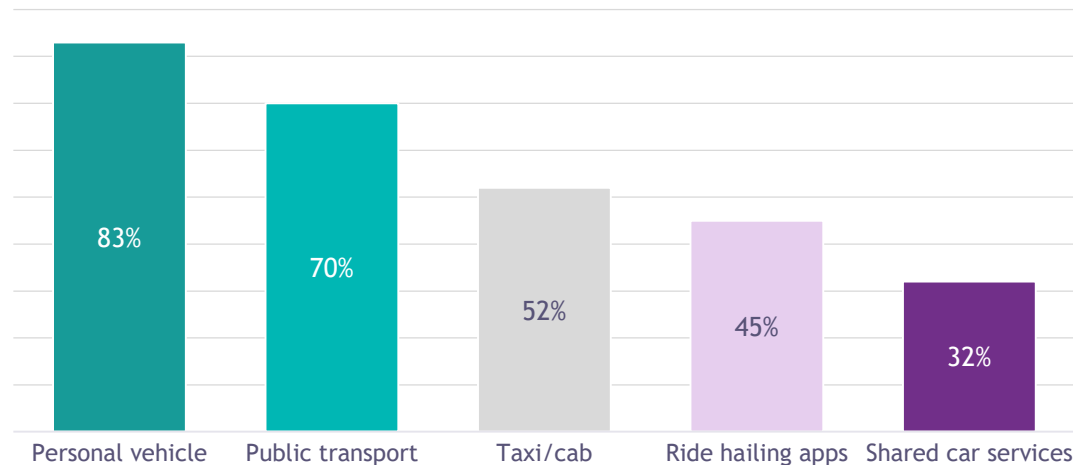


Behaviors related to social distancing and safety of personal space, show up in analysis related to the types of transportation modes consumers intend to use in the future.

The most widely used form of transportation before the pandemic was personal vehicles, followed by public transportation, and finally taxis, ride hailing and other shared car services. When asked about their plans post-pandemic, “personal vehicle” was the only mode that had as many respondents saying “more” as “less”.

Average across global markets - Population using before - % avg

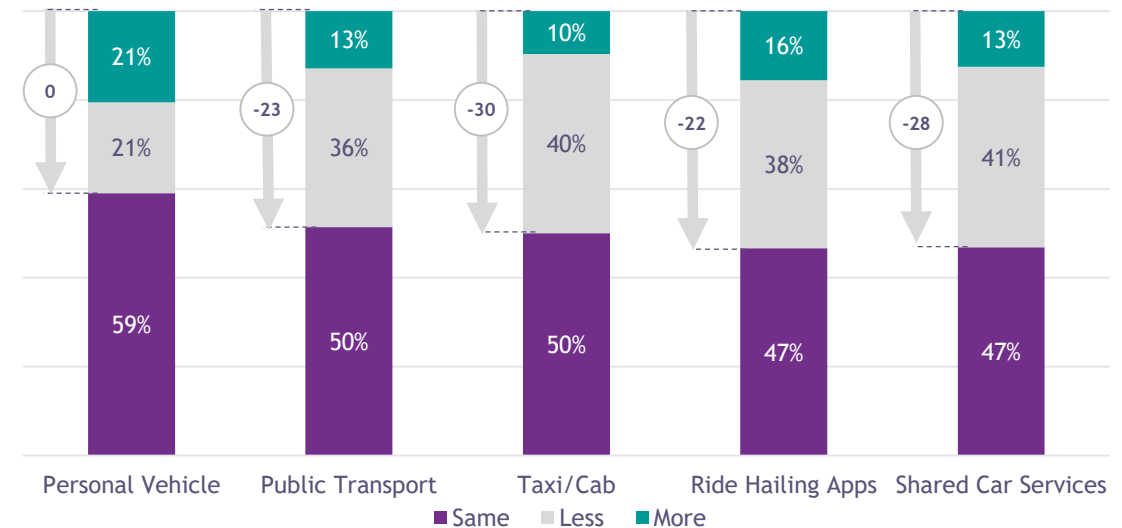
Looking ahead 12 months, for the following modes of transportation, how much do you expect to use them moving forward relative to pre-pandemic times?



All other forms of transportation had a net negative ratio of shared-to-personal. The behavioral shift towards personal vehicles ownership, as preferred mode of transportation, poses a challenge for the companies with the significant investments in the mobility as a subscription business model. It will be interesting to see how much these attitudes were driven by a “COVID mindset” and is trend to watch closely going forward.

Average across global markets - Claimed future behaviour change - % avg across countries

Excludes Non-Users of mode



Mobility behaviors: Outlook for personal vehicle usage and use of other transportation



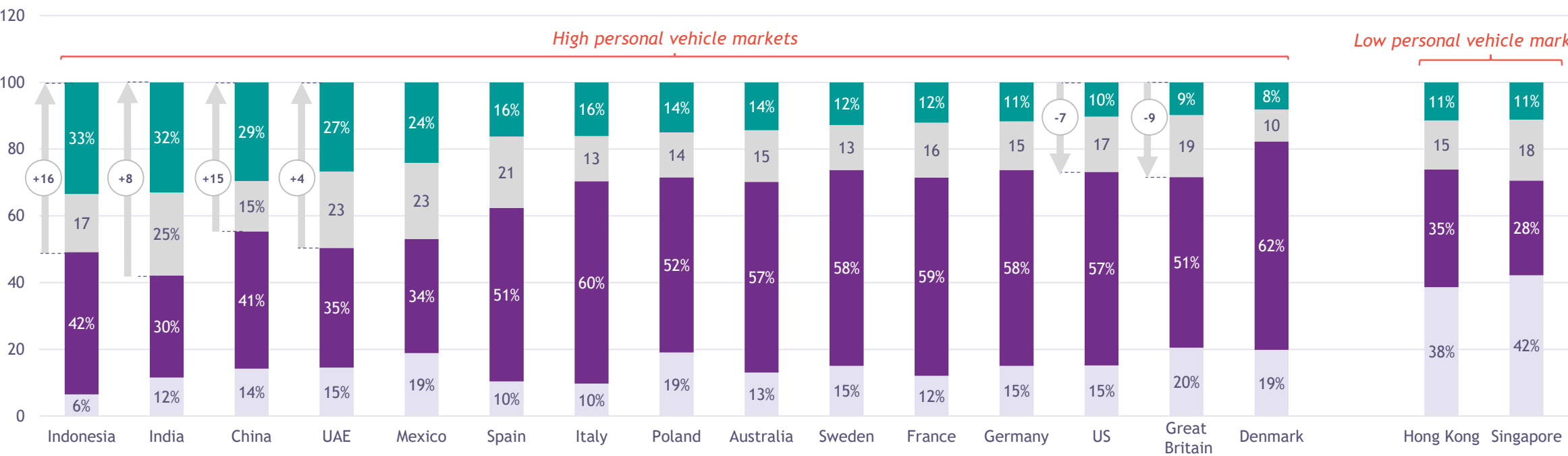


Consumer outlook for personal vehicle usage

Across the 17 markets surveyed, the desire to use personal vehicles in the next 12 months was mixed. In key markets, where there is a high penetration of personal vehicle use already, the data shows that emerging markets intend to use them more in the future. Indonesia, India, China and UAE all intend to use personal vehicles more (vs less). This aligns with other data we showed where they state a decreased usage of both public transportation and ride hailing apps. In other markets, notably in Western Europe and the USA, personal vehicle use is also negative on the more-to-less ratio. This is likely due to less overall transportation demand, as these markets were also negative on all other transportation modes.

Population intent to use personal vehicles - % by countries

Looking ahead 12 months, for the following modes of transportation, how much do you expect to use them moving forward relative to pre-pandemic times?





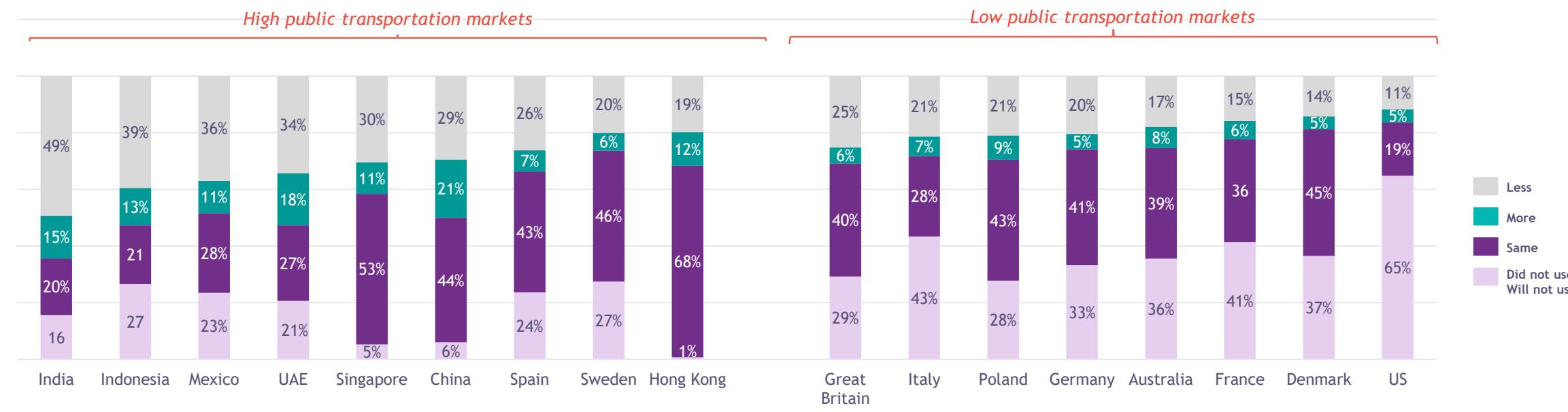
Consumer outlook for public transportation usage

When it comes to using public transport, the intent varies heavily market to market. The state of the transportation market globally today will have a profound impact on the shape of mobility in the future. Markets with a high dependency on public transportation, and cautious behavior related to it, will be looking for alternatives. This is particularly important for emerging markets, among which public transportation market penetration is among the highest.

A shift away from public transportation will have implications for environmentalism, city congestion, and use of personal vehicles including two wheelers.

Population intent to use public transport - % by countries

Looking ahead 12 months, for the following modes of transportation, how much do you expect to use them moving forward relative to pre-pandemic times?



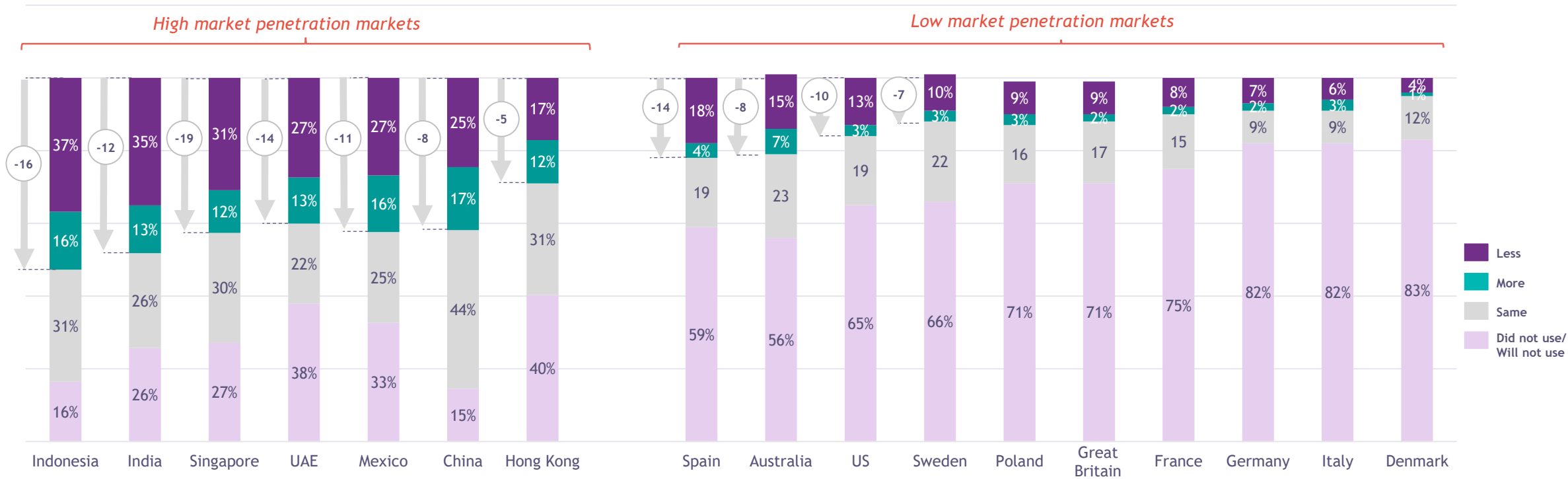


Consumer outlook for ride hailing usage

Ride Hailing Apps were hard hit during the pandemic, as use cases such as social, events, and other activities dried up due to restrictions. When asked about plans to use this form of transportation in the next 12 months, the more-to-less ratio was negative in all markets observed. Much work will need to be done to restore confidence in ride hailing as a safe and viable transportation mode. Note that this is sentiment as collected from respondents in June 2021. As time progresses, this will be a crucial indicator to observe, as it could change quite rapidly.

Population intent to use ride hailing apps - % by countries

Looking ahead 12 months, for the following modes of transportation, how much do you expect to use them moving forward relative to pre-pandemic times?



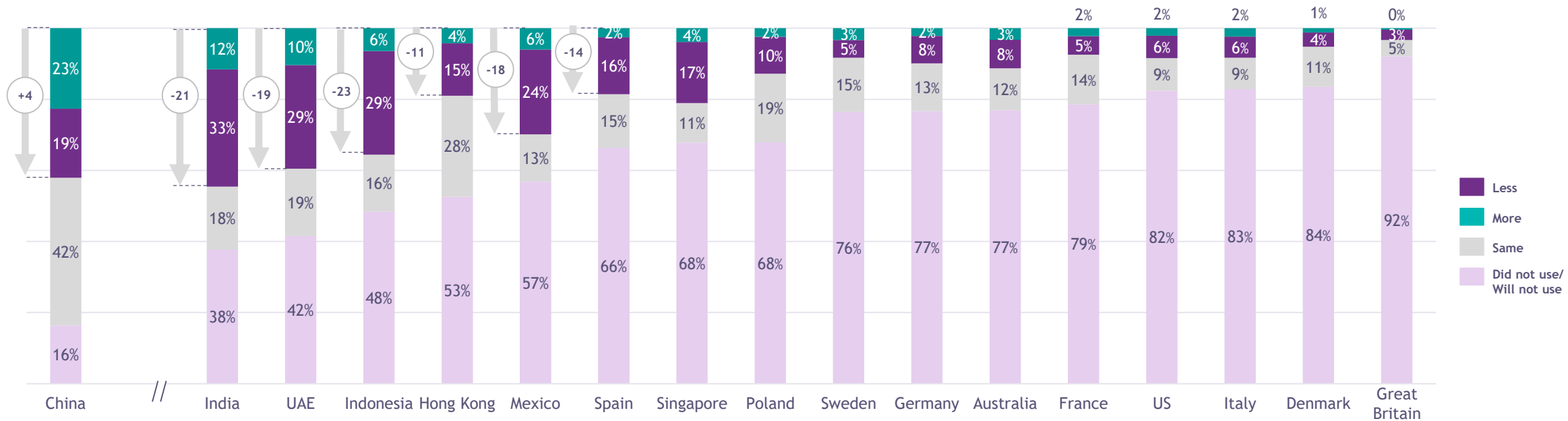


Consumer outlook for car sharing services

Car Sharing Services are among the latest innovations in the space of personal vehicle options. The industry is still immature, with China being the only market with a high adoption rate and strong intention for the future. India, the second most penetrated market for this type of service, has one of the biggest less-to-more intention ratios among any markets. New user acquisition will be crucial to continue the growth of this industry. With several major Western European markets and the US lagging in adoption and lower intention to use in the next 12 months, this will be an industry to continue closely monitoring consumer behavior. For the car sharing services industry to become a mainstream personal vehicle ownership model will require greater growth alongside the indicators that show sentiment is changing across the 17 markets surveyed.

Population intent to use car sharing services - % by countries

Looking ahead 12 months, for the following modes of transportation, how much do you expect to use them moving forward relative to pre-pandemic times?





Opportunity spotlight

UNDERSTANDING INDIA'S INCREASING DRIVERS

India was one of five markets surveyed that showed a net increase in intent to use a personal vehicle. One-third (33%) of Indian respondents say they will use their personal vehicle more in the coming year than they did in pre-pandemic times, compared to only 25% of respondents saying they will use it less. This behavioral change will have an impact on companies across the transportation landscape competing for this audience's transportation expenditures.

To compete for the attention of this audience, companies will need to identify who these drivers are, and more deeply understand what they believe and value, especially when it comes to mobility and transportation. By connecting this custom survey on Mobility & Transportation to YouGov's Data Cube, featuring our proprietary [YouGov BrandIndex](#) and [YouGov Profiles](#) offerings, we can develop rich personas like the following example across 100,000s of variables including demographics, psychographics, attitudes, interests, brand/category behaviors and media consumption.

YouGovBrandIndex

A **syndicated brand tracker** that covers hundreds of sectors and thousands of brands around the globe.

YouGovProfiles

A **profiling database** of thousands of consumer metrics that connect with other tools or are used standalone.



Data delivered weekly or monthly depending on source

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In India, 23 million passengers commute by train every day, often in busy carriages with **no personal space.***

**Source: Business Insider, February 28, 2016*

Huge scope for growth due to the low penetration of cars - 22 cars per 1,000.



Audience spotlight: Planning to drive more in India



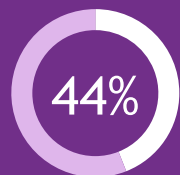
Defined as those consumers:

“Expect to use a personal vehicle MORE in the next 12 months”

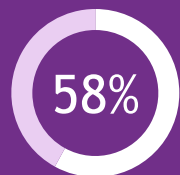
(Compared to pre-pandemic)

+

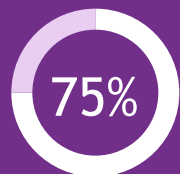
“India 16+”



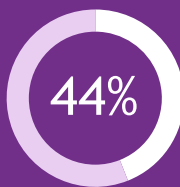
45 year & older
(226 index vs. IN Nat Rep)*



Male
(114 index)



Mid/High Income
(144 index)



Tier 1 City
(127 index)



Full-Time Work
(170 index)

Car buying attitudes & behaviors



- **92%** say the Internet is their main source of information (119i)
- **76%** say advertising helps them choose what they buy (124i)
- **64%** bought NEW when purchasing their main car (150i)

Vehicle Type Owned



Engine Type Considered

Motorcycle	44	114i
Scooter	37	118i
Car	33	130i

Petrol	52	106i
Electric	39	125i
Hybrid	22	144i
Natural Gas	20	177i

Top Brands by Consideration %

1.	Tata Motors 31%	(160i)
2.	Maruti Suzuki 29%	(127i)
3.	Honda 26%	(131i)
4.	Hyundai 24%	(130i)
5.	Royal Enfield 22%	(158i)

Top Brands by Consideration Affinity

1.	Jeep 15%	(245i)
2.	Mercedes Benz 17%	(199i)
3.	Jag/Land Rover 10%	(167i)
4.	Renault 13%	(166i)
5.	Tata Motors 31%	(160i)

*NOTE: Indices compare India Drivers Planning to Drive More to the India National Rep 18+ audience. Example: A 226 index among those 45 years and older means the Increasing Indian Driver (44% 45 yrs.+) is 2.2 times likely to be 45 yrs.+ than the Nat Rep Audience (19%)

Future perspective

Behavioral shifts in mobility and transportation have been accelerated with the pandemic. The transition from individual car ownership to mobility as a service (car subscription business model) has been impacted by the pandemic. The intent to drive a personal car rather than using a car as a service, is an unforeseen behavioral change.

The mobility services' companies experienced a major global disruption. The pandemic has brought an economic crisis which is resulting in further transformation, consolidation, innovation and some company closures in the sector. The key to the success of companies in this area will be in the fast and flexible adoption of the business models to meet the changed mobility and transportation behaviors and attitudes of the customers globally.

The need for mobility and transportation will continue. With the increased digitalization of the industry and societal behavioral change, there is no doubt that traditional automotive OEMs and new digital providers, have to move swiftly to anticipate the route and the future customer spend for mobility and transportation.

Mobility and transportation as a service does not yet have a major presence globally. However, the shift from a transportation focused on vehicle ownership and capacity, to a service-based model, focused on the usage, could happen quickly. This presents major disruption to a mature mobility model, that will suit best the agile companies (old and new).



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Section 2:

The road to an omni-channel automotive path to purchase



Executive Summary



Main findings

- Digital advances have impacted the auto industry purchase journey introducing new online car buying options.
- Of the 17 markets surveyed, most buyers purchase the vehicles from the dealership or in person from an owner.
- China, India, Hong Kong and UAE are the leaders in the online car purchasing (20%-35%).
- US and Europe adoption of online car purchasing is less than 15%.
- Gen Z (31%) and Millennials (27%) are most likely to purchase a car online.
- Automotive manufacturers and online retail providers must provide flexible omni-channel experience to meet the demands of the future car buyers.
- Ability to get the best price and test drive are important factors for future car buyers. The ability for price negotiation and test drive must form the part of the omni-channel customer journey.
- Data from the key European markets shows greater hesitancy in adoption of online car buying (compared to global data), with in-person experience being more attractive option. The opportunity and need for increasing the omni-channel and digital retail in Europe is significant. It requires a focused strategy by the automotive sector to build the infrastructure and the trust of the car buyers.
- US car buyers show higher intention to avoid the price negotiation¹⁹ which will drive them towards online car buying.



The road to an omni-channel automotive path to purchase

Over the past two decades the customer purchase journey in most industries has been disrupted significantly, moving from one that was largely in-person to an omni-channel journey that seamlessly toggles between physical and digital experiences.

While digital advances have impacted the auto industry purchase journey - including greater access to information online, enabling buyers to virtually experience the cars they are considering, and introducing new online car buying options - for many buying a vehicle the final steps of their journey looks very similar to those from decades earlier. The prospective buyer heads to a dealership (or a few), browses several vehicles, test drives some that make it through their initial screening, and at some point, they begin the (sometimes painful) process of negotiating a price for their new vehicle. Even as automotive manufacturers have increased the options to customize and purchase the new vehicle online, many buyers have been slow to embrace this option.

Our insights and implications in this section are drawn from a recent global survey on the car buying path to purchase. Our survey data was further bolstered by connecting it to YouGov's data cube and our proprietary data solutions - [YouGov Profiles](#) and [YouGov BrandIndex](#) - allowing us to merge these respondents' answers with 100,000s consumer attributes that we are continuously collecting.

In this section, we set out to baseline current global auto purchase behavior, to understand buyers' future intentions to buy online, and to uncover the markets and the consumer groups that would be most likely to drive the change. Our research highlights the benefits and barriers auto manufacturers and dealers must account for with shifting buyer attitudes across the globe.





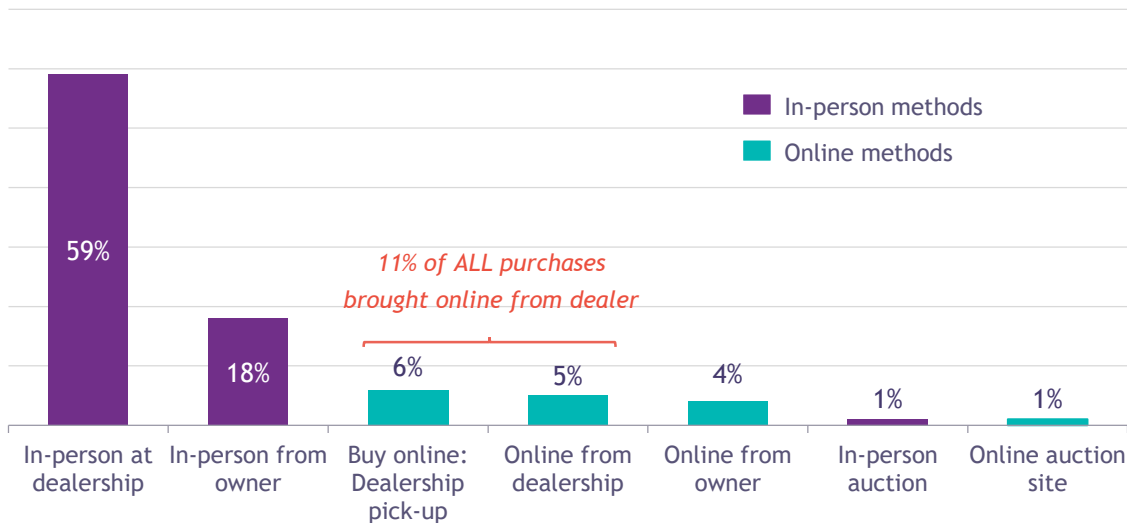
Current car purchase behavior: an industry slow to evolve

To get a baseline of current purchase behavior, we asked our respondents how they made their last car purchase (new or used).

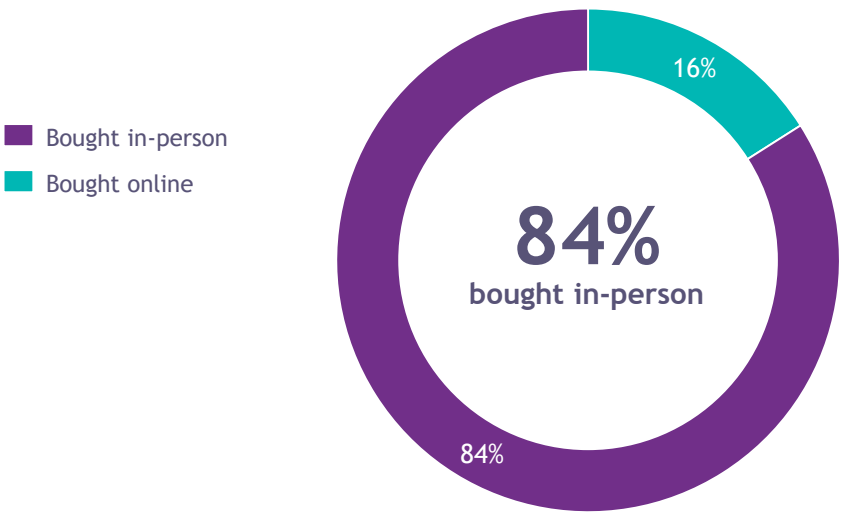
The traditional path of buying, in person from a dealership, was the majority approach, comprising nearly 3 in 5 of respondents' most recent global auto purchases. Buying a car in-person from the prior owner was a distant second at 18% of all purchases.

Among those that have purchased a vehicle, only 16% of all purchase were made online, with only 11% of online purchases from dealerships. Looking solely at dealership purchases, which globally make up about 7 in 10 auto purchases, only 16% of purchases from dealers are made digitally. So, while some are opting out of the traditional car purchase journey, many buyers are still following the same path of buying a car in person.

Average across global markets - Prior car purchase method - last vehicle purchased
Thinking of your last vehicle purchase, how did you buy your car?



Average across global markets - Prior car purchase method from dealerships - % avg



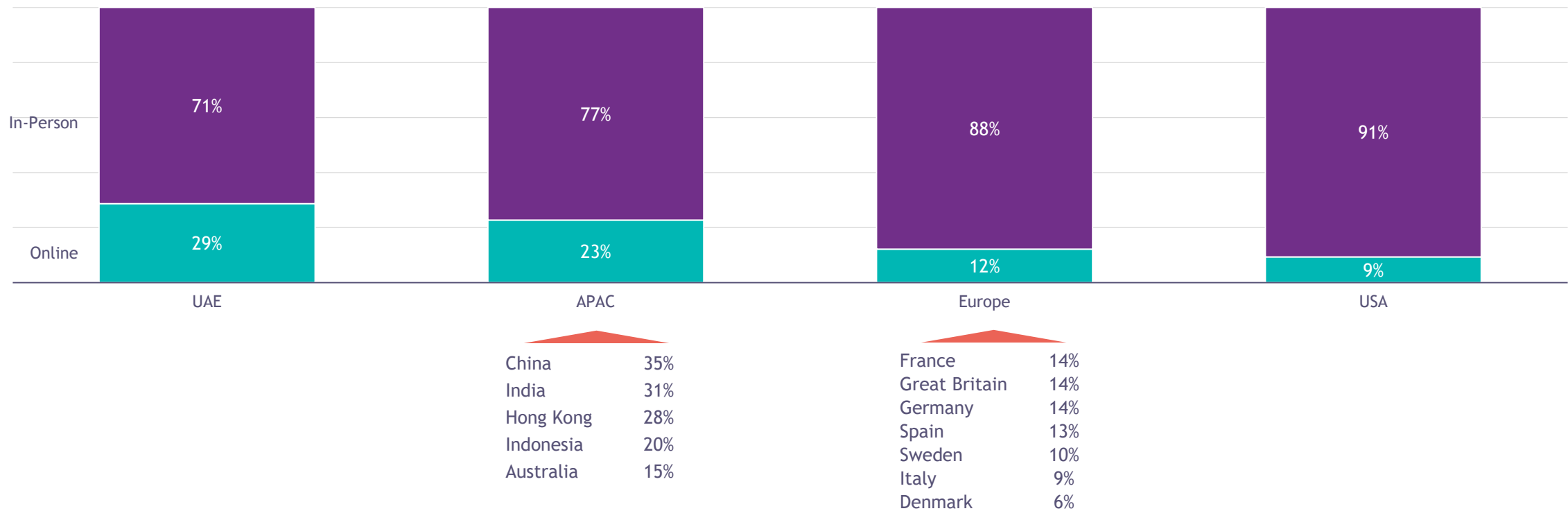


APAC & UAE markets are currently most likely to buy online

Despite the lagging incidence of online car buying globally, there are markets and consumers that have been far swifter to swap the dealership experience for a digital one. Globally, consumers in China (35%), India (31%), UAE (29%), and Hong Kong (28%) all greatly outpace the global average (16%), far outdistancing Europe (12%) and the US (9%). Higher adoption in these markets is driven by many factors, including a younger car buying population and greater engagement with digital commerce in these markets.

Comparison of prior car purchases at dealerships - % by region

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

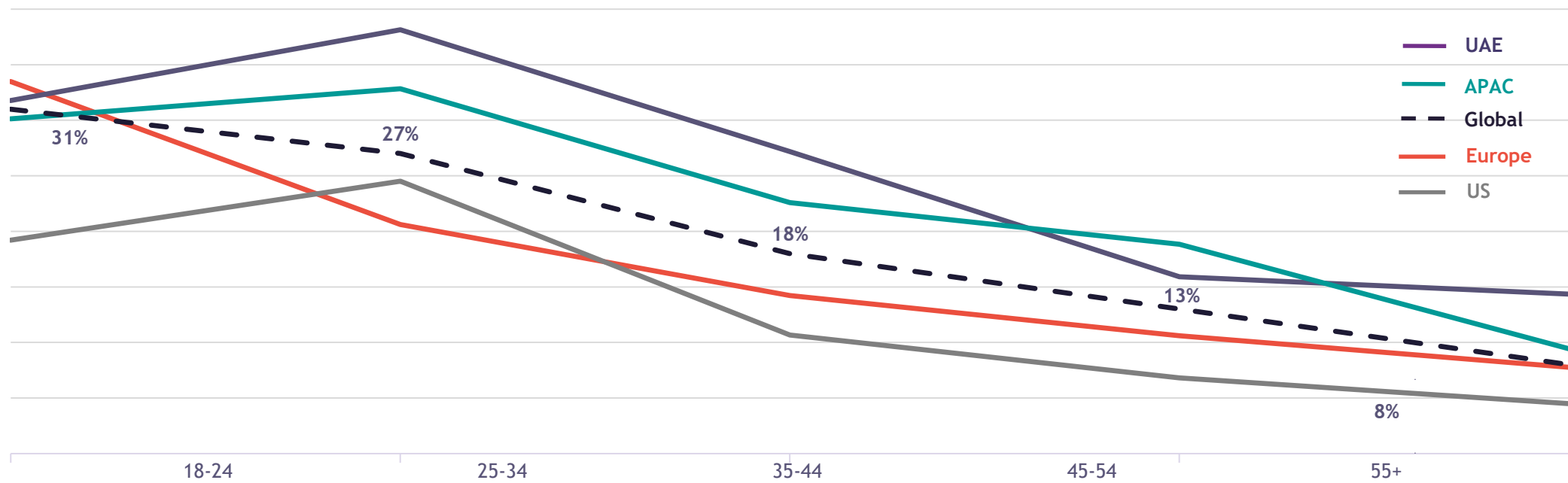




Young buyers are more likely to buy online today

Looking globally at prior online purchases by age cohort, the incidence rates are far higher among Gen Z (31%) and Millennial (27%) car buyers, not necessarily surprising given the fact that these younger buyers are “digital natives” and generally are more engaged in e-commerce. On a regional basis, the 25 to 34 year cohort shows the greatest incidence of past online car purchasing across all age groups in APAC, UAE and the USA. It is worth noting, current online buying in the US lags global averages across every age cohort. The online adoption curve looks a bit different in Europe, where 33% of those aged 18 to 24 have purchased online, the highest figure amongst our global comparative set. However, online car buying penetration in Europe drops well below those of APAC and the UAE for all age cohorts twenty-five and older.

Average across global markets - % of prior online car buyers by region & age cohort
Thinking of your last vehicle purchase, how did you buy your car?





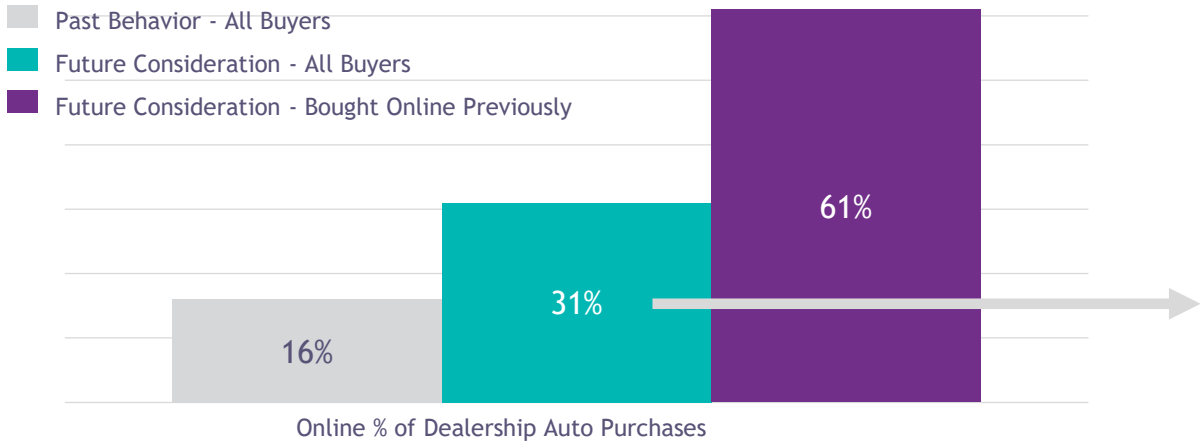
The road ahead to an omni-channel model

Whether due to continued movement towards an e-commerce world, the growth of digital-first car makers like Tesla, younger tech-savvy consumers entering the car market, or the influence of the pandemic moving more shoppers online, one thing is certain - car buyers are more open to purchasing their vehicle online than ever before. Globally, 31% of future car buyers say they will consider buying their next vehicle online. This is nearly twice as high as current online purchase incidence (16%). Even more impressive, among those that have previously purchased a vehicle online, the percent of buyers that will consider digital for their next buy jumps above 60%, signaling most were satisfied with the prior experience. As prospects show increased affinity for buying online, to win these

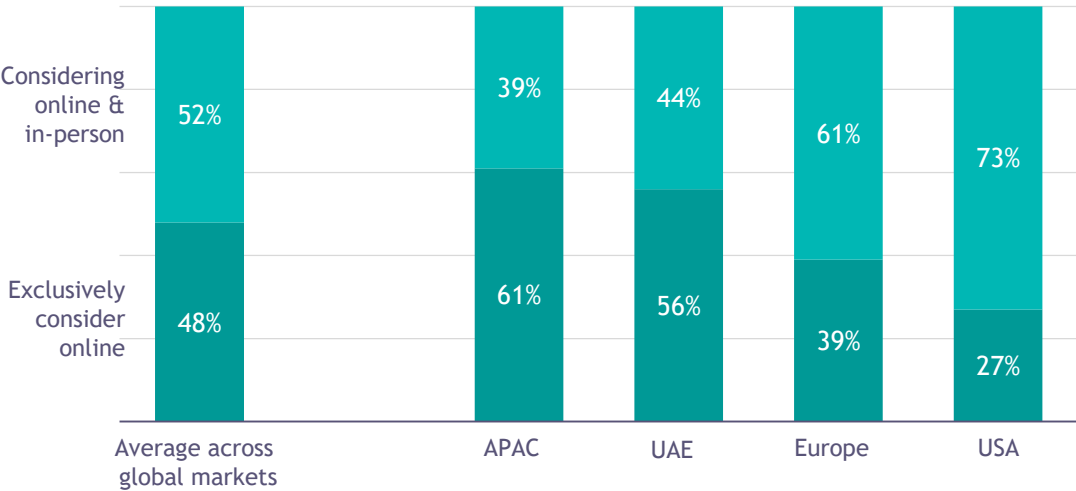
buyers auto manufacturers and dealers will need to deliver an omni-buying experience, providing digital and physical experiences. Even among the 31% that say they are considering buying an auto online, less than half of those globally say that they will exclusively shop online, indicating a need for seamlessly connected in-person and digital experiences across the path to purchase. The key to the success of the omni-channel model in the automotive sector will be flexibility. Auto makers and dealers must present connected, cohesive experiences that meet prospective buyers where they want to be met, providing them with the flexibility to choose which paths of the journey to conduct online vs. in person or offline.

Average across global markets - Comparison of prior purchase behavior & future consideration - % avg

Thinking of your next vehicle purchase, which would you consider when buying?



Buying methods considered by future online considers

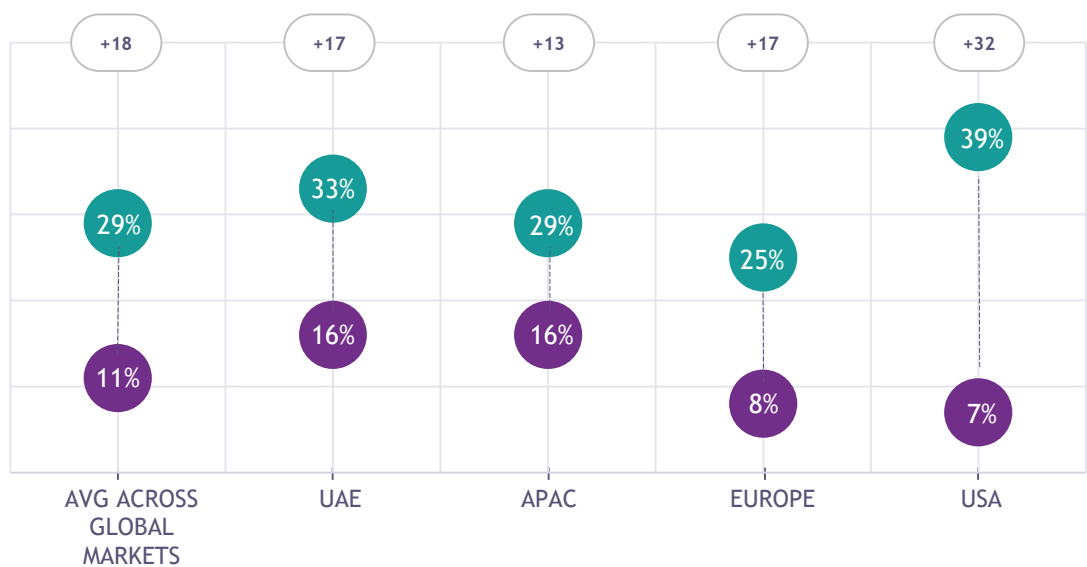




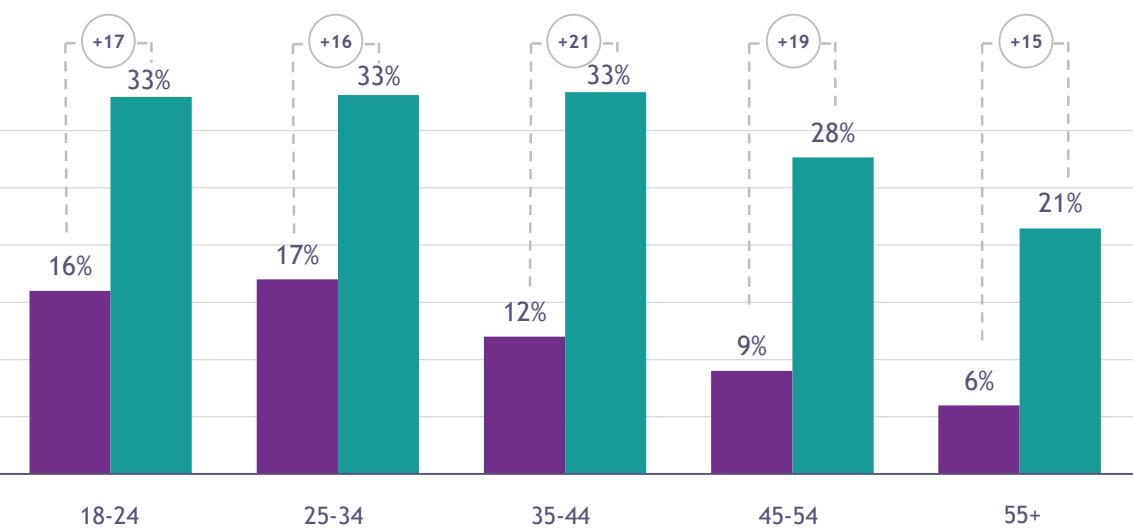
Demand for digital experiences growing globally

While large differences exist across customer groups among past online purchase behavior, our forward-looking consideration figures show an optimistic, consistent theme - increased interest in buying cars online, regardless of region or buying age. From a global perspective, nearly 30% of all future car buyers say they will consider buying online through a dealership, a rate nearly three times greater than those who bought online previously through a dealer. We see growth in consideration across all regions, with the most impressive jump in intent coming from the US, going from 7% of past purchases to nearly 40% of future purchases considering online, the highest rate among all regions. Similarly, we observed large positive gaps between past behavior and future consideration when looking across age cohorts globally. While customers between 35-54 years of age showed the greatest jump, every age group climbed fifteen-plus points, including the 55+ buyers who have been slower to embrace online buying. This is important data as automotive makers and dealers need to build and fine-tune the customer experience, so it works for a very broad prospective customer base. The omni-channel experience for car buyers must be flexible, reliable and secure, to ensure the smooth purchase behavior changes.

Past purchase & future consideration by region
Thinking of your last vehicle purchase, how did you buy your car?



Past purchase & future consideration by age cohort - % avg
Thinking of your last vehicle purchase, how did you buy your car?



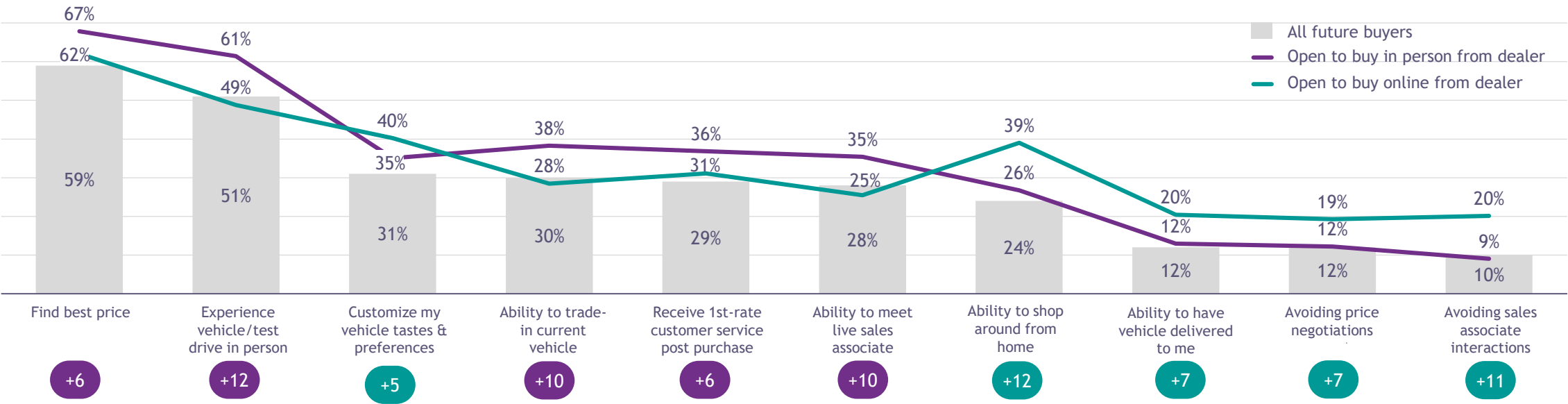


Online & in-person experiences provide different benefits

Globally, the top two factors by far influencing buyers’ journey decision are “Finding the best price” (59%) and having the “Ability to experience or test drive the vehicle” (51%) in person. This is not surprising given the traditional car purchase journey was centered around going into a showroom, test driving a new vehicle, and if the time comes then negotiating over price with an eager sales associate. We start to see interesting differences when we drill down further and explore the factors that motivate someone to consider buying online vs. in-person. As expected, in-person shoppers value the ability to experience the vehicle, and in-person access to sales associates. Interestingly, these buyers also believe that shopping in-person allows them to find the best price. Perhaps this is true, perhaps this is their ego regarding their own negotiation skills. On the other end, online is the clear-cut leader when it comes to convenience and customization. Not only does the digital journey empower the buyer by allowing them to shop around and customize their future vehicle, but it also allows the customer the ability to completely avoid stages of the traditional purchase journey, like price negotiations and meeting with sales associates, that they find undesirable.

Average across global markets - Top drivers impacting future purchase decision by audience - % avg

Thinking ahead to your next vehicle purchase, which factors are important to you in determining where you purchase your vehicle? Please select all that apply.



Difference between In-person & online considerations

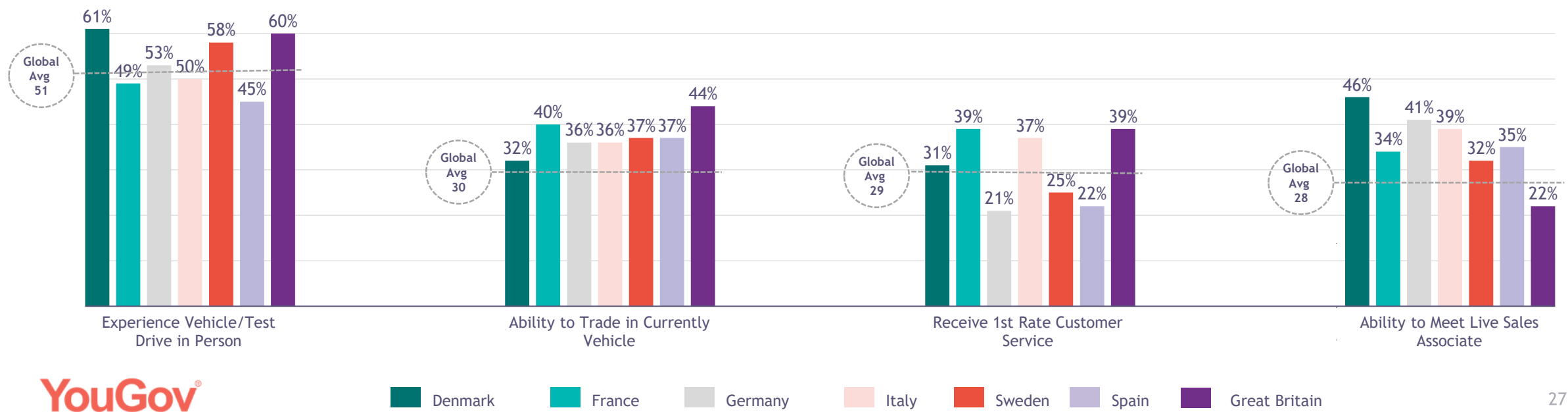


Adoption hurdles exist in European markets

By drilling down to the national level, we uncover clearer signals of motivations and barriers, that will either drive or impede the adoption of online auto buying in those markets. Looking at the drivers impacting future purchase decisions across major European markets, we see potential barriers impeding online adoption. In Europe, a region where future consideration (25%) lags the global rate (29%), buyers prefer experiences that the traditional model is currently better suited to deliver. While there is some variation from country to country, generally Europeans are more likely to place greater value on in-person experiences such as seeing and test driving the vehicle, trading in their current cars, meeting face-to-face with a sales associate and receiving great customer service. For example, Germany scores 13 percentage points higher on the importance of meeting with a sales associate compared to global norms. In Great Britain, buyers rate “Receiving first rate customer service” ten points higher than the average across global markets. Certainly, as technology like 5G and virtual/augmented reality advance, and consumers become more broadly accepting of them, there is an opportunity to drive down these barriers and apprehensions that some European buyers show, by providing a digital experience that mimics or improves upon the traditional in-person approach.

Drivers impacting future purchase decision - Europe

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



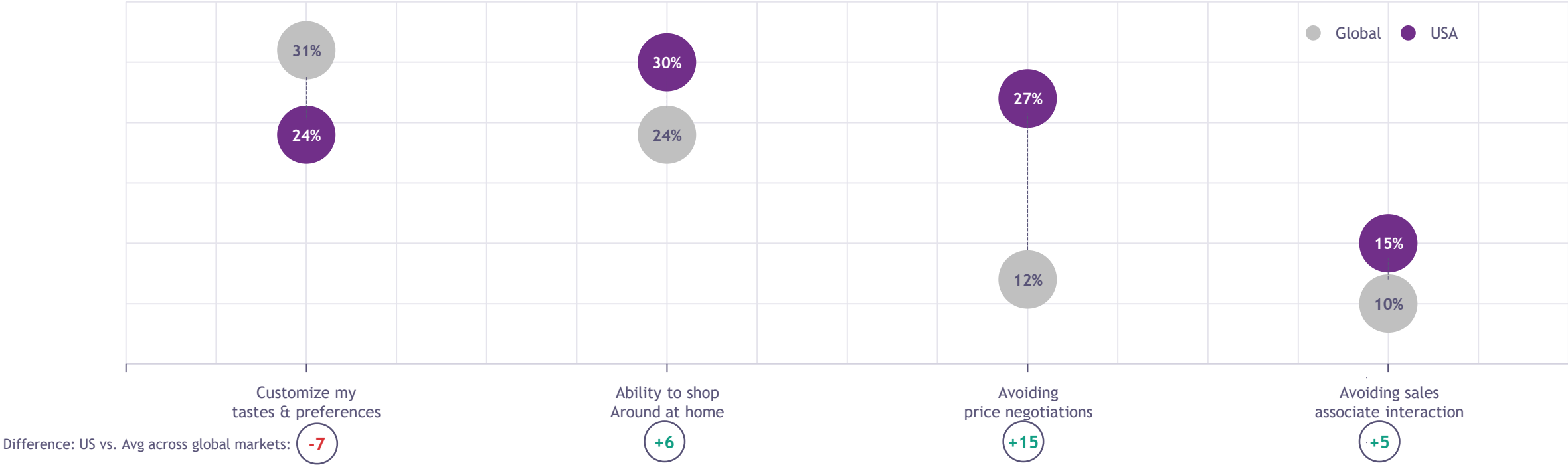


US attitudes signal omni-channel opportunities

Looking specifically at the US, we see a different picture, as American attitudes towards the car purchase journey help to explain the rise in future online purchase behavior. In the US, where future online consideration (39%) was more than five times greater than past behavior rates (7%), buyers are far more motivated by the convenience of shopping virtually and by having the ability to avoid potentially unpleasant price negotiations with dealers. In no market is there a greater aversion to price negotiations than in the US, where 27% say they will decide where and how they buy their next car, by the ability to avoid pricing conversations - a full 15 points higher than the global average.

Drivers impacting future purchase decision - US

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





Opportunity spotlight

THE US ONLINE INTERESTED AUTO BUYER

For automotive manufacturers, independent dealerships and online retailers it is not enough to simply know that car buyers are increasingly more likely to purchase their next vehicle online. To win in the marketplace, these companies must understand the attitudes and motivations of these future online buyers to build an omni-channel purchase experience that meets this audience's needs at every turn. Further, by more deeply understanding this audience, manufacturers, dealers and retailers will be better positioned to reach these prospects with meaningful content at the right time in their buying journey.

To understand more about the US audience that may buy its next auto online, we tapped into the power of YouGov's connected data systems by linking this custom survey to YouGov's Data Cube, featuring our proprietary [YouGov BrandIndex](#) and [YouGov Profiles](#) offerings, allowing us to analyze the US Online Car Buyer across 100,000s of variables including demographics, psychographics, attitudes, interests, brand/ category behaviors and media consumption.

YouGovBrandIndex

A **syndicated brand tracker** that covers hundreds of sectors and thousands of brands around the globe.

YouGovProfiles

A **profiling database** of thousands of consumer metrics that connect with other tools or are used standalone.



Data delivered weekly or monthly depending on source

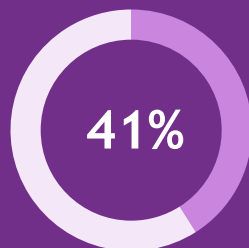


Audience spotlight: The US online interested auto buyer

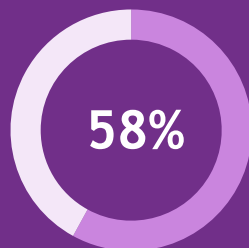


Defined as those consumers:

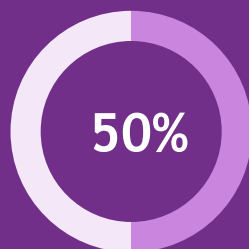
“Plan to buy a car”
+
“Considering
buying online ”
+
“US 18+”



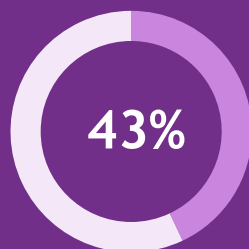
Millennial
(131 index
vs. US Nat Rep)*



Male
(119 index)



**Mid/High
Income**
(116 index)



Suburban
(136 index)

80%

Technology changes
life for the better
(114 index)



Tech saavy

60%

I'm usually interested
in the latest technology
(120 index)

70%

AI will help humans
with daily tasks
(112 index)

46%

Shopping is more fun
with Augmented Reality
(129 index)

Purpose driven



61%

I'm willing to
pay more for
sustainability
(127 index)



57%

I like brands
willing to get
involved in
social issues
(119 index)



38%

Identify as
a “Planet
Protector”
(136 index)

*NOTE: Indices compare US Online Interested Auto Buyers to the US Nat Rep 18+ audience. Example: A 131 index among Millennials means the US Online Interested Audience (41% Millennial) is 31% more Millennial than the Nat Rep Audience (32% Millennial)

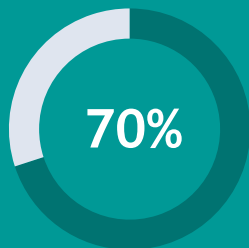
Audience spotlight: The US online interested auto buyer



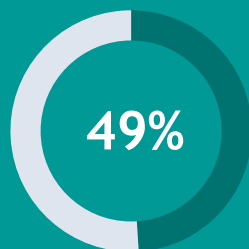
AUTO ATTITUDES

Purchase consideration driven by technology features

1. Auto-parking (273i)
2. Touchscreen control (232i)
3. Advanced driver assistance (214i)
4. Autonomous driving (209i)
5. Lane departure warning (204i)



believe electric cars are the future (111i)



believe foreign cars are better quality (120i)



BUYING BEHAVIORS

89%

Technology changes believe online shopping makes life easier (124i)



Top Auto Websites

Researched:

1. Carmax 16% (210i)
2. Edmunds 16% (324i)
3. Manufacturer's Website 13% (166i)
4. Cars.com 14% (185i)
5. AutoTrader 12% (195i)

CAR BRAND CONSIDERATION

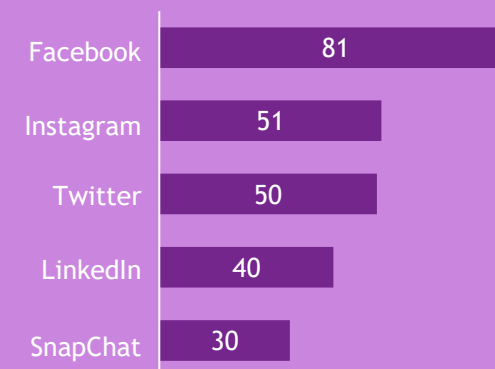
Top 5 by Consideration %

1. Honda 36% (142i)
2. Toyota 35% (108i)
3. Ford 33% (131i)
4. Chevrolet 29% (123i)
5. Subaru 27% (163i)

Top 5 by Affinity

1. Volvo 21% (338i)*
2. Audi 18% (282i)
3. Acura 17% (274i)
4. Mazda 24% (263i)
5. Tesla 19% (209i)

MEDIA HABITS



57% are HEAVY social media users (113i)

2X more likely to be a HEAVY user of streaming services like Netflix

55% are HEAVY/ MEDIUM podcast listeners (162i)

Future perspective

The omni-channel car buying path is increasingly a choice for the car buyers globally. Automotive manufacturers, independent dealerships and online retailers are progressively adopting online car buying offerings. This has been motivated by consumers' drive to e-commerce in all areas of retail. Car buying is a more complex journey than most retail experiences, so it has been slower to be introduced as a main path to buying a car.

The car purchase journey is a complex one and requires the many points of the experience to be connected and work smoothly, regardless of the channel that the path has been taken on. The car buying omni-channel experience must be a fully flexible, smooth journey dictated by the needs and preferences of the prospective buyer. It must have a fully connected digital solution, aligned with the non-online activities such as test driving, payment at the dealership or phone call to discuss the car features.

The data trends show that omni-channel car buying will be more and more in demand globally and the customer expectations for the omni-channel car journey will be higher. If the solutions are not meeting customer expectations, the poorly executed and operationalized car buying omni-channel solutions will result in a sub-optimal customer experience, thus adversely impacting car brands and manufacturers.



Methodology



The insights in this study are drawn from a recent global Real-Time survey the topics of mobility, transportation, and automotive purchase behavior, covering 17 global markets and nearly 19,000 respondents. Our survey results were further bolstered by connecting respondent level data to YouGov’s proprietary data solutions, BrandIndex and Profiles, allowing us to merge our respondents and their answers to the 100,000s consumer attributes that we collect on an ongoing basis for audience segmentation and profiling. Our survey was fielded the week of March 8th through the week of April 19th, 2021.

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 paper, following population representation was used:

Region	Market	Population Sampled Representation	Sample Size (n=)
APAC	Australia	National representative - 16+	1,050
	China	National Online - 16+	1,020
	Hong Kong	National Online - 18+	511
	Indonesia	National Online - 18+	1,037
	India	National Online (Urban only) - 18+	1,004
	Singapore	National representative - 18+	1,053
MEA	UAE (United Arab Emirates)	National representative - 18+	1,014

Region	Market	Population Sampled Representation	Sample Size (n=)
North America	US	National representative - 18 years of age +	2,000
	Mexico	National (Urban focus) - 18+	1,064
Europe	UK	National representative - 18+	2,093
	France	National representative - 18+	1,001
	Germany	National representative - 18+	1,053
	Spain	National representative - 18+	1,024
	Denmark	National representative - 18+	1,011
	Italy	National representative - 18+	1,015
	Poland	National representative - 18+	1,017
	Sweden	National representative - 18+	1,019

ABOUT YUGOV

YouGov is an international research data and analytics group headquartered in London. Our data-led offering supports and improves a wide spectrum of marketing activities for our customer base that includes media owners, brands and media agencies. We work with some of the world's most recognized brands.

Our line of products and services includes YouGov BrandIndex, YouGov Profiles, YouGov RealTime, YouGov Custom Research, YouGov Crunch and YouGov Direct.

With over 17 million registered panel members in more than 55 countries, YouGov's market research covers in GB, the Americas, Mainland Europe, the Middle East, and Asia-Pacific. Our panel members come from all ages, socio-economic groups, and other demographic types - allowing us to create representative samples of whole populations and different sections of society.

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