



The Role of the Internet in New Car Purchases

October 2011



Agenda

1 Introduction

2 Executive Summary

3 Data Library

Demographics of New Car Buyers

Summary of the Purchase Journey

Online versus Traditional and In-Person Sources

Role of the Internet at Each Phase

Role of Internet for Activities and Decision-Making

Role of Search Engines

Role of Online Video

Role of Mobile Devices in Online Auto Research

Brand Selection

Luxury versus Volume Brands

Brand Discoverers

Purchase Location and Dealer/Seller Selection

Response to Online Requests

Dealer Visits

4 Conclusions

Methodology

11,056 interviews with new car buyers across 13 countries were conducted in 2011

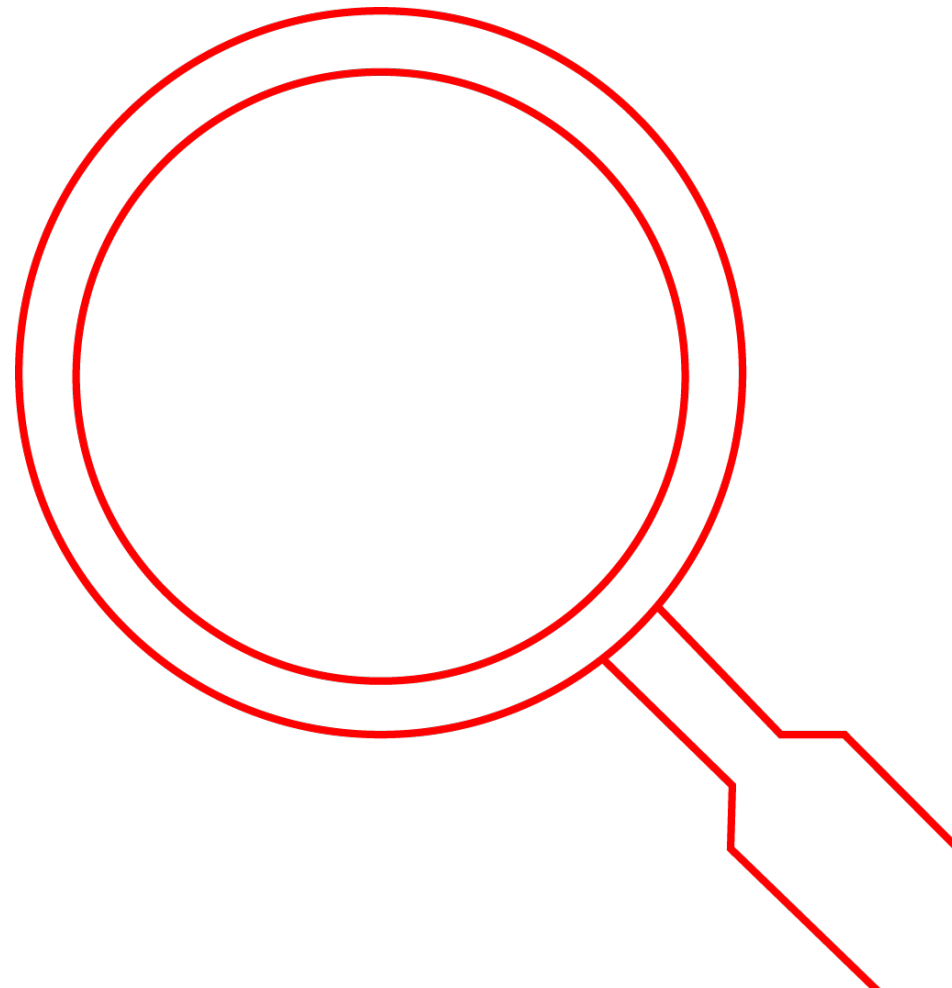
Countries	No. of Interviews
Australia	851
China	850
France	851
Germany	853
Italy	851
Japan	850
South Korea	850
Netherlands	850
Poland	850
Portugal	850
Spain	850
Turkey	850
UK	850

Methodology

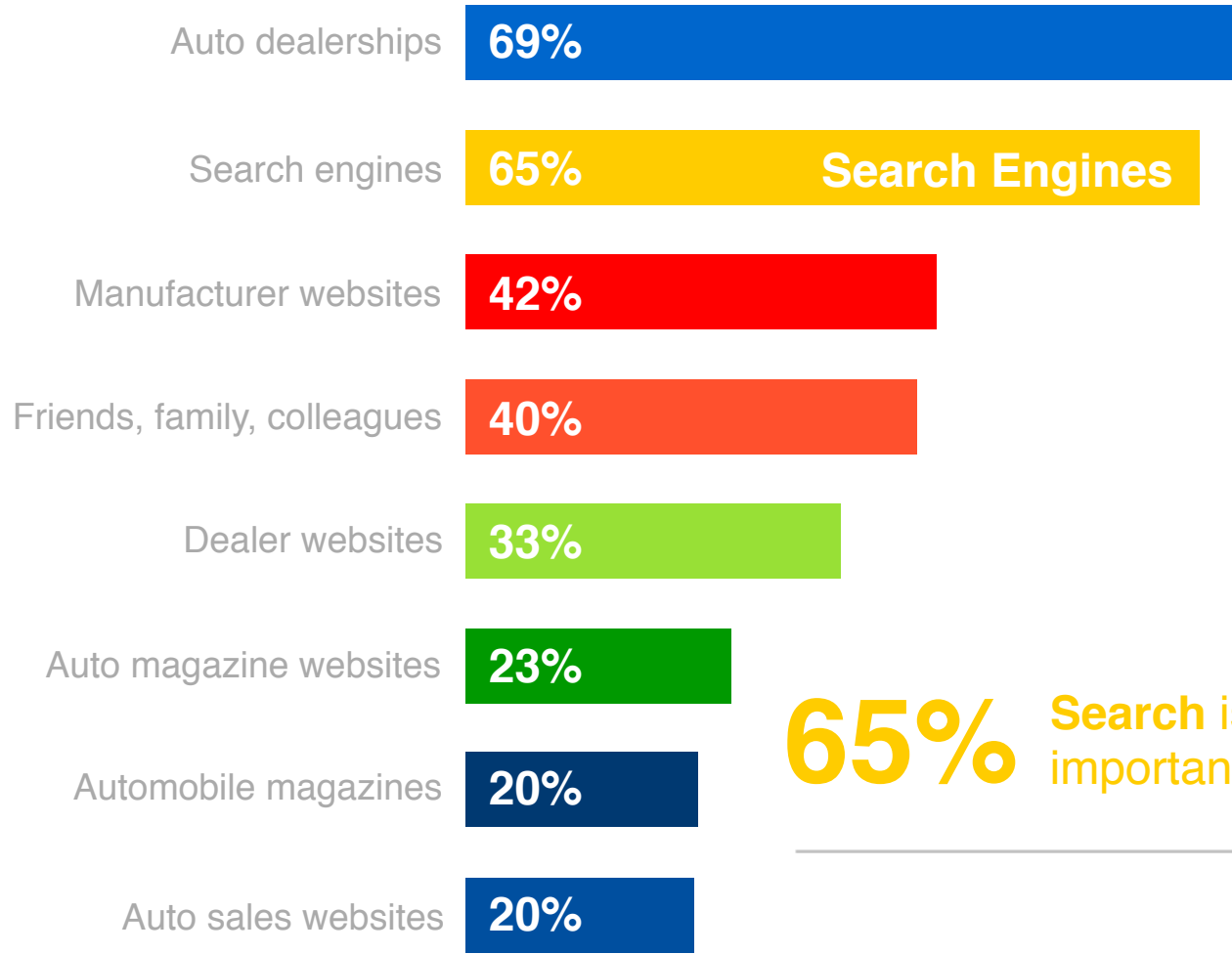
This report presents the attitudes and behaviours of new car buyers in all 13 countries

- Respondents needed to have purchased a new vehicle within the last 12 months
- Data were collected via online survey between June 24 to October 4, 2011
- Respondent selection was managed using stratified random sampling based on a joint distribution of age/gender categories throughout the duration of data collection
- Questions that were involved with brands, sources, research activities were designed slightly differently by country to reflect the local situations

SEARCH ENGINES FOR AUTO RESEARCH



Search Engines are a Leading Source for Auto Research



65% Search is the **most** important **online** source

Search is a Critical Gateway to Other Online Sources

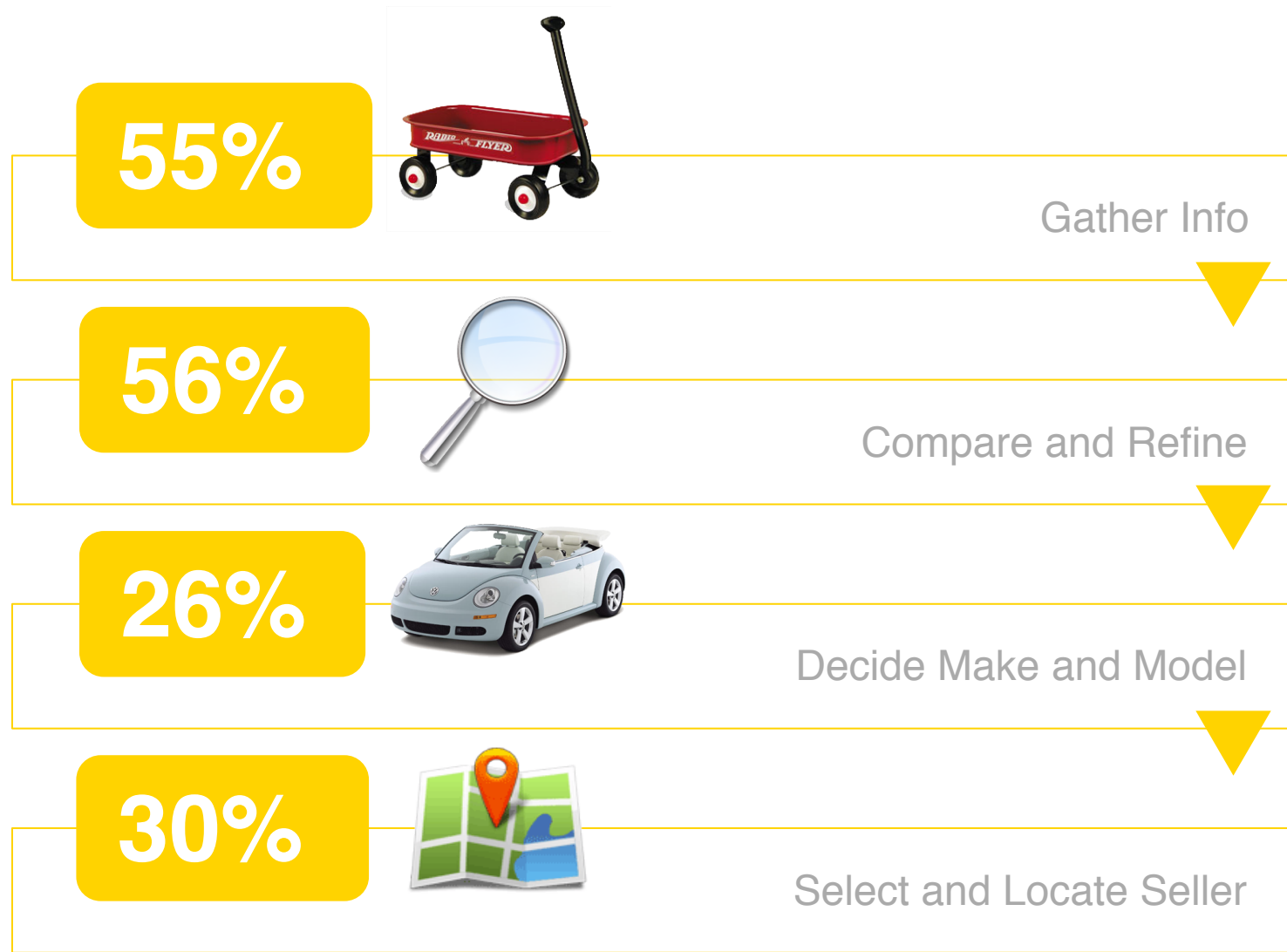


n varies: 847 to 3663

Base: All new car buyers who use the website



Many Use Search at Each Phase



n varies: 8382 to 11056

Base: All new car buyers who used sources to research at this phase

Search Users are Serious Online Researchers



Use Internet at Every Phase

Gather Info

Search Users

Non-Users

87%

19%



Compare and Refine

88%

20%



Decide Make and Model

48%

10%



Select and Locate Seller

67%

47%

Use More Online Sources

3.9 1.8

Do More Activities Online

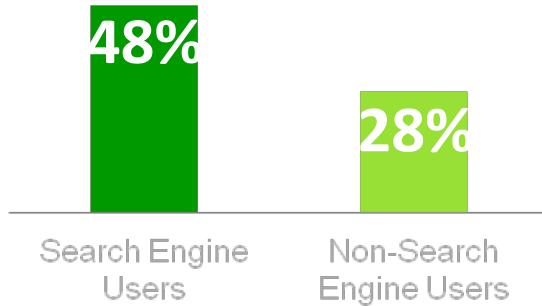
5.4 3.2

n varies: 5776 to 7183
Base: Search users who used sources
to research at this phase
n varies: 2606 to 3873
Base: Non-search users who used sources
to research at this phase

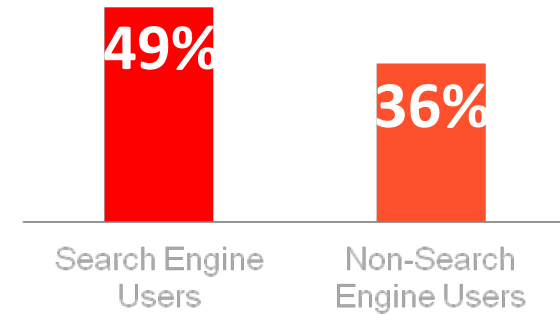


Search Users are Mobile

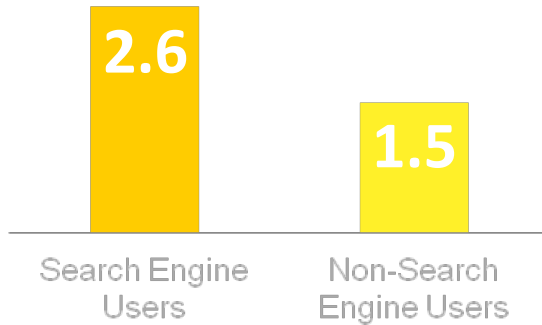
Research Cars via Mobile Device



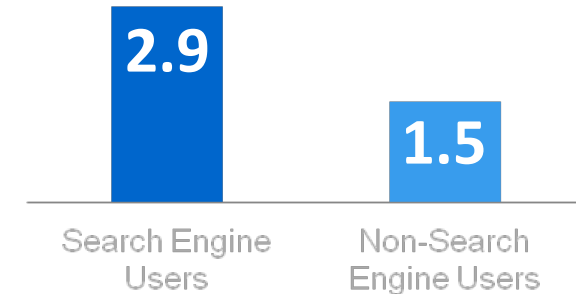
Access Internet via Smartphone



Access More Sources via Mobile



Do More Auto Research Activities via Mobile



Search Users are Discerning Buyers

Consider More
Brands...

3.9

46% Switched

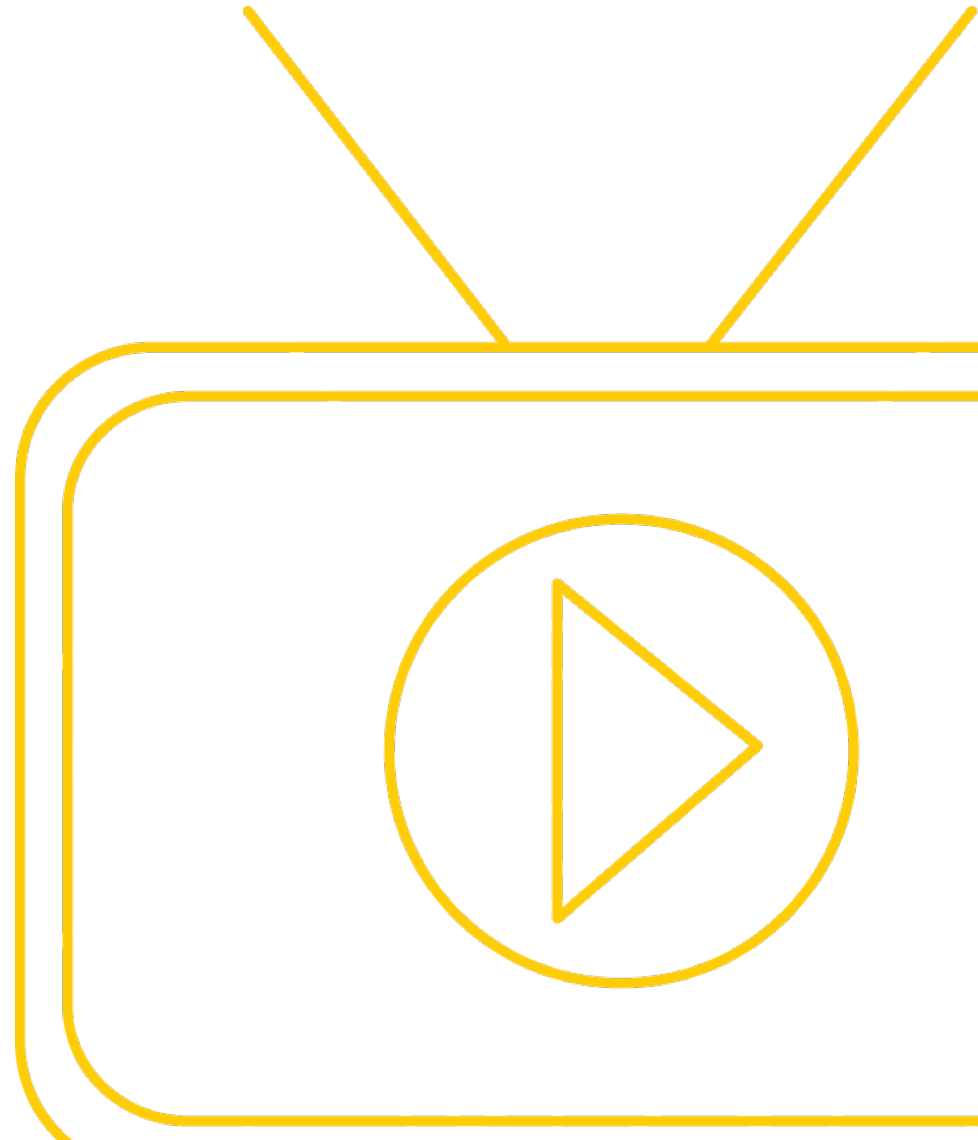
More Likely to
Switch Brands...

75%

Watch Online
Auto Videos



ONLINE VIDEO FOR AUTO RESEARCH



Auto Videos Have Strong Use and Recall

90% can recall the type of online auto video they watch

54%

Watch Online Auto Videos During the Research Process

67%

Online version of commercial produced by manufacturer

52%

Other videos produced by manufacturer

37%

Online videos from a third-party

29%

Online videos by amateurs/consumers

Online Videos are Used at Each Phase



62%

Gather Info



50%

Compare and Refine



36%

Decide Make and Model



11%

Select and Locate Seller

Online Auto Videos Have Appeal and Impact

Convenient

Good Quality

Makes me aware
of new brands

92%

Have a **Positive Perception** of
Auto Videos

79%

Say Auto Videos
have a **Positive Impact** on Brands

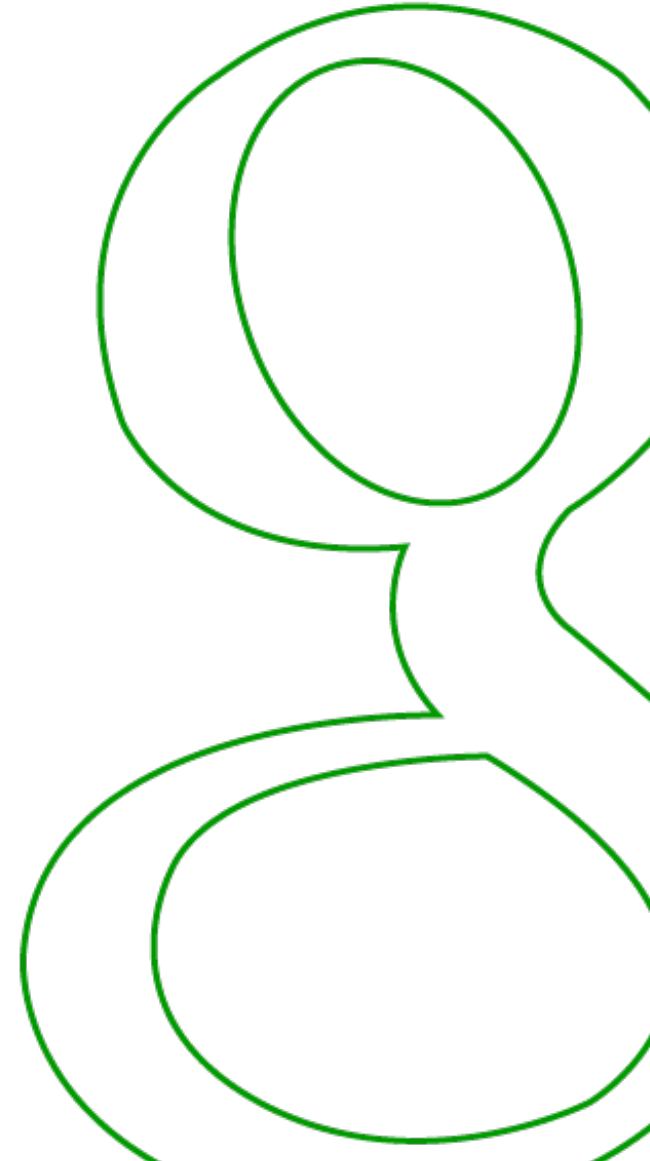
Easy to find

Wish there
were more!

Helps to narrow
my choices

Makes me
more interested
in a brand

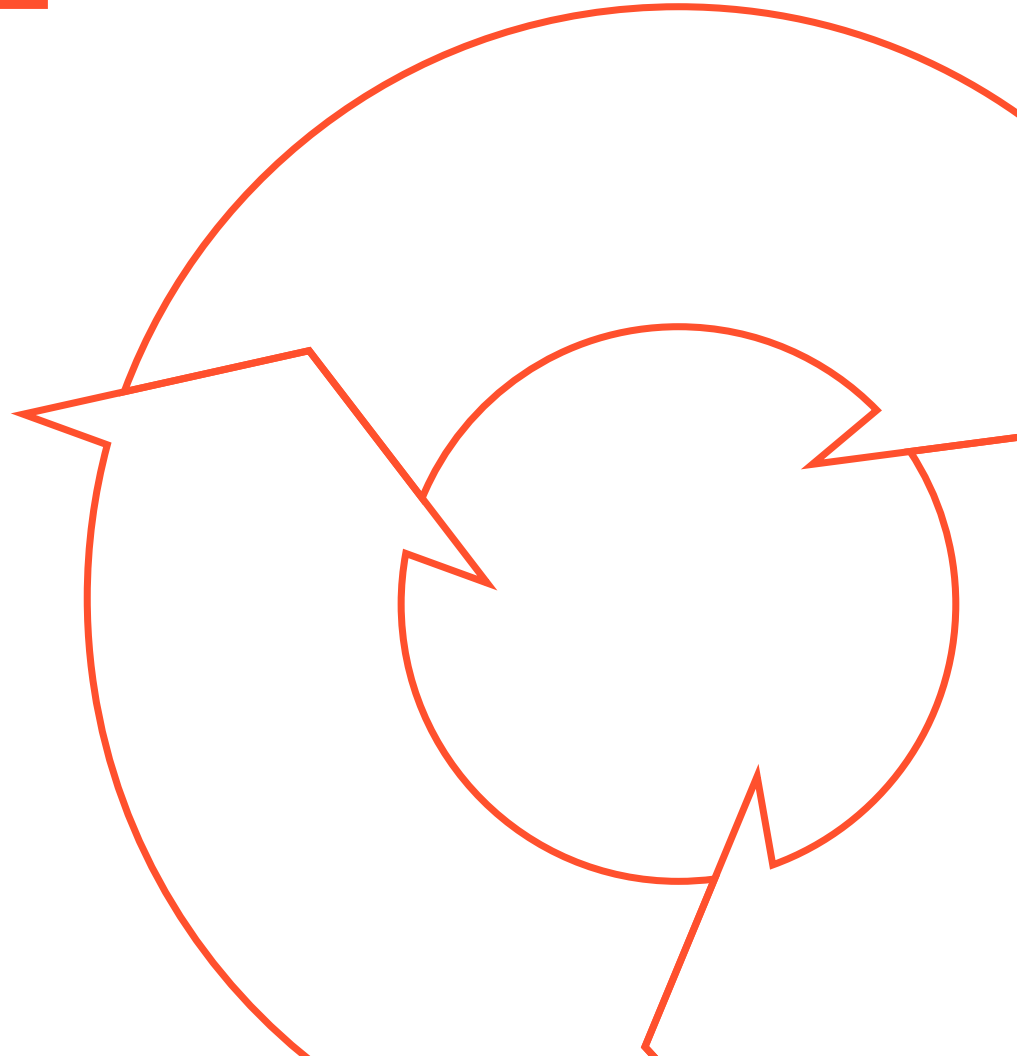
GOOGLE & YOUTUBE



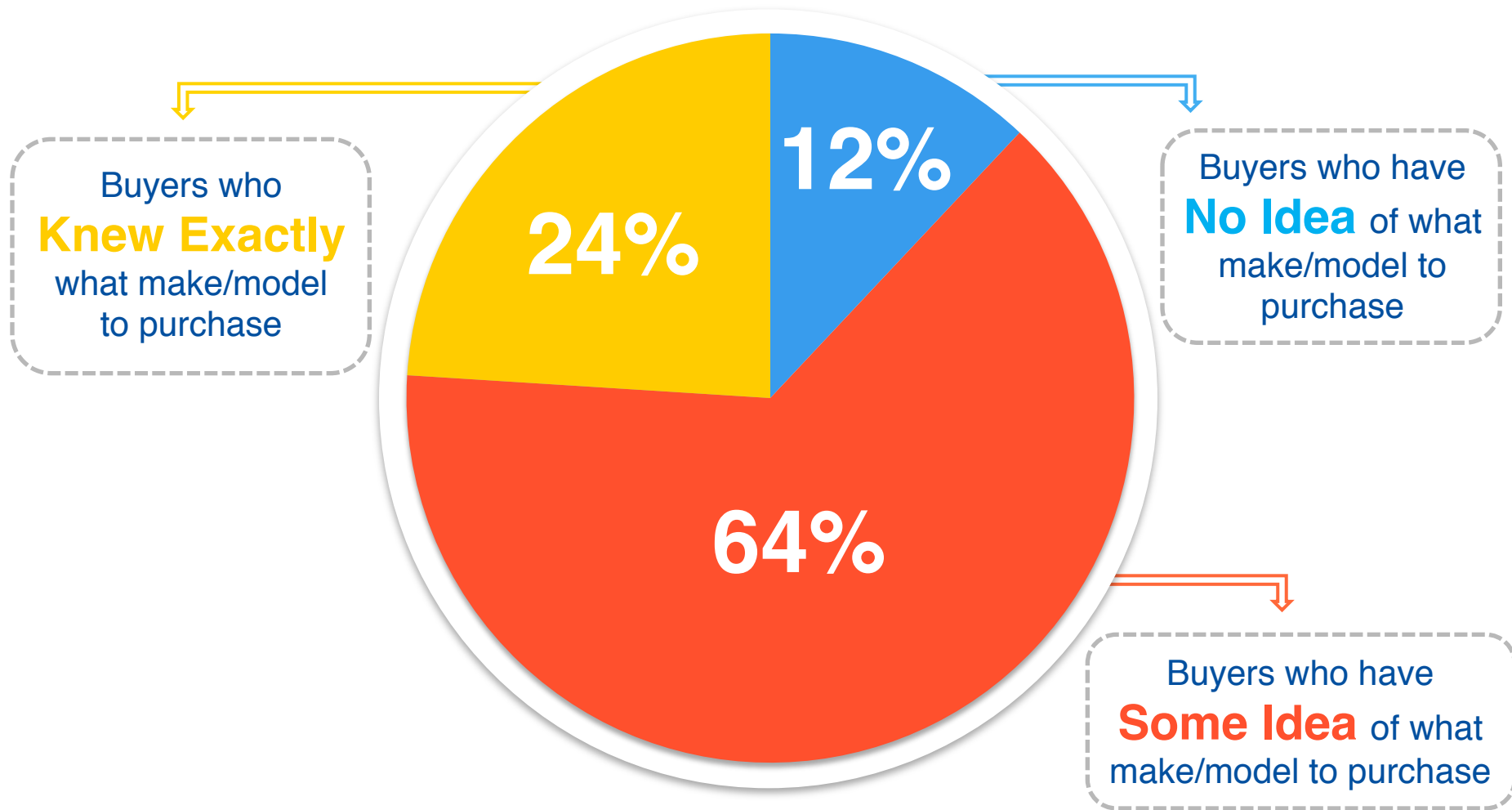
Major Brands for Auto Research



STRATEGIC ADVANTAGE OF ONLINE

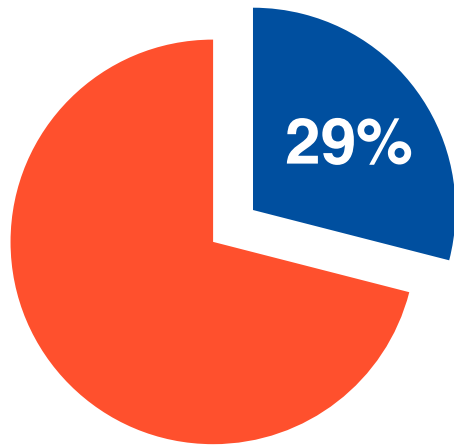


Most Buyers Have **Some Idea** at Start of Research

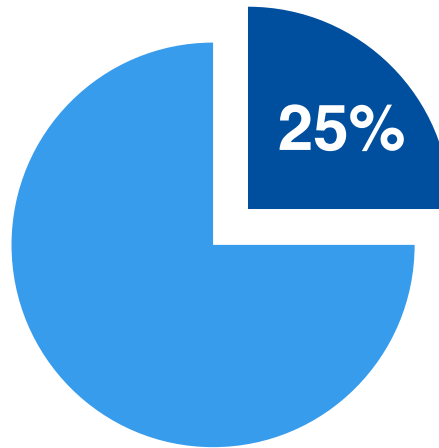


Online Sources Influence Buyers Who Need More Guidance and Info

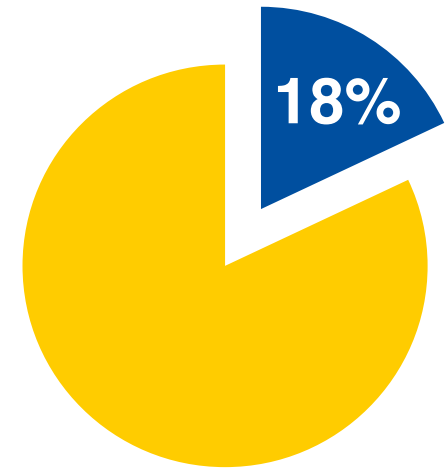
Some Idea



No Idea



Knew Exactly



Say **online sources** were “**most influential**” in helping them **modify** which **makes/models** they **consider**

n=7044

BASE: All new car buyers who had some idea

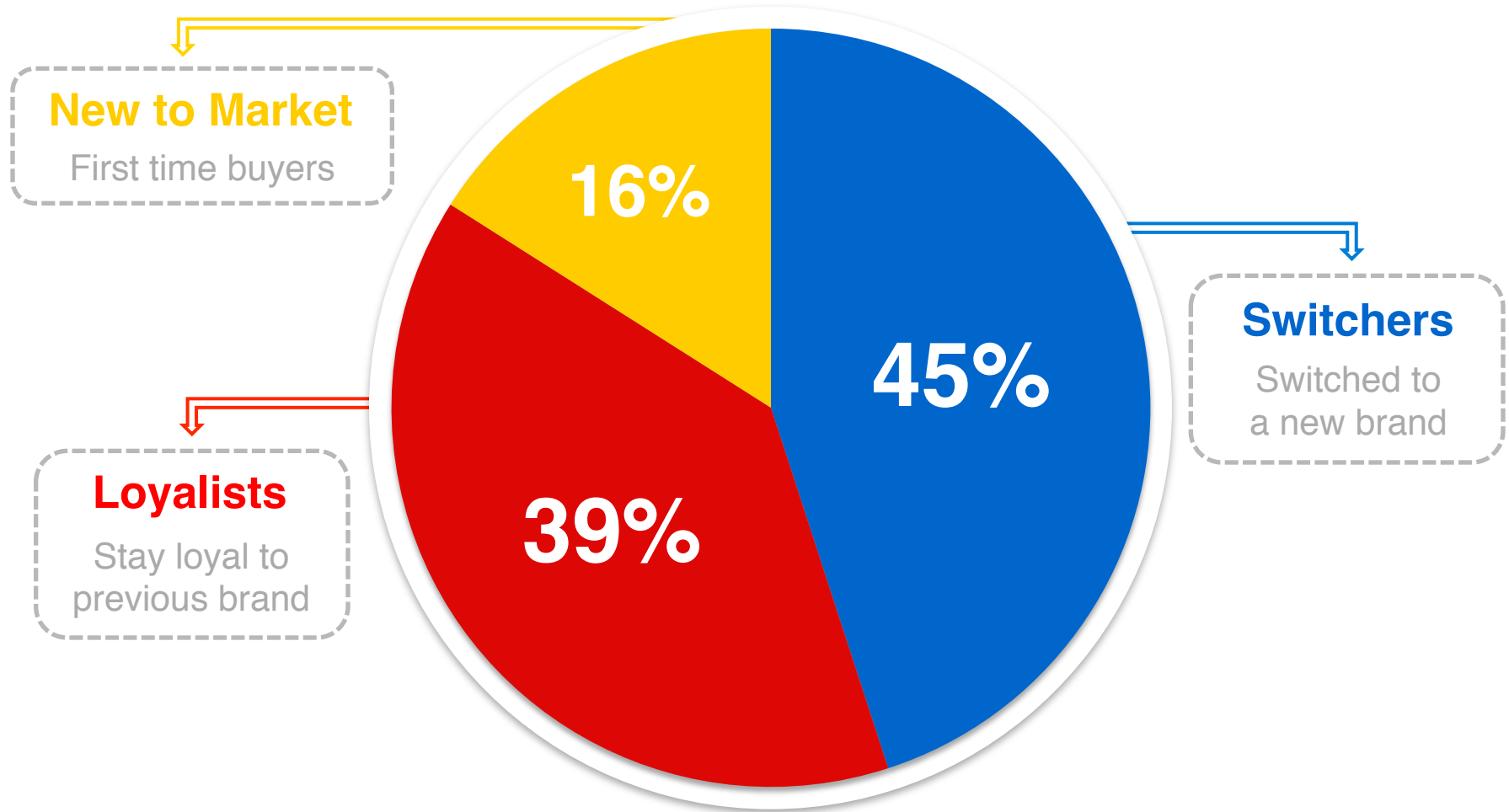
n=1371

BASE: All new car buyers who had no idea

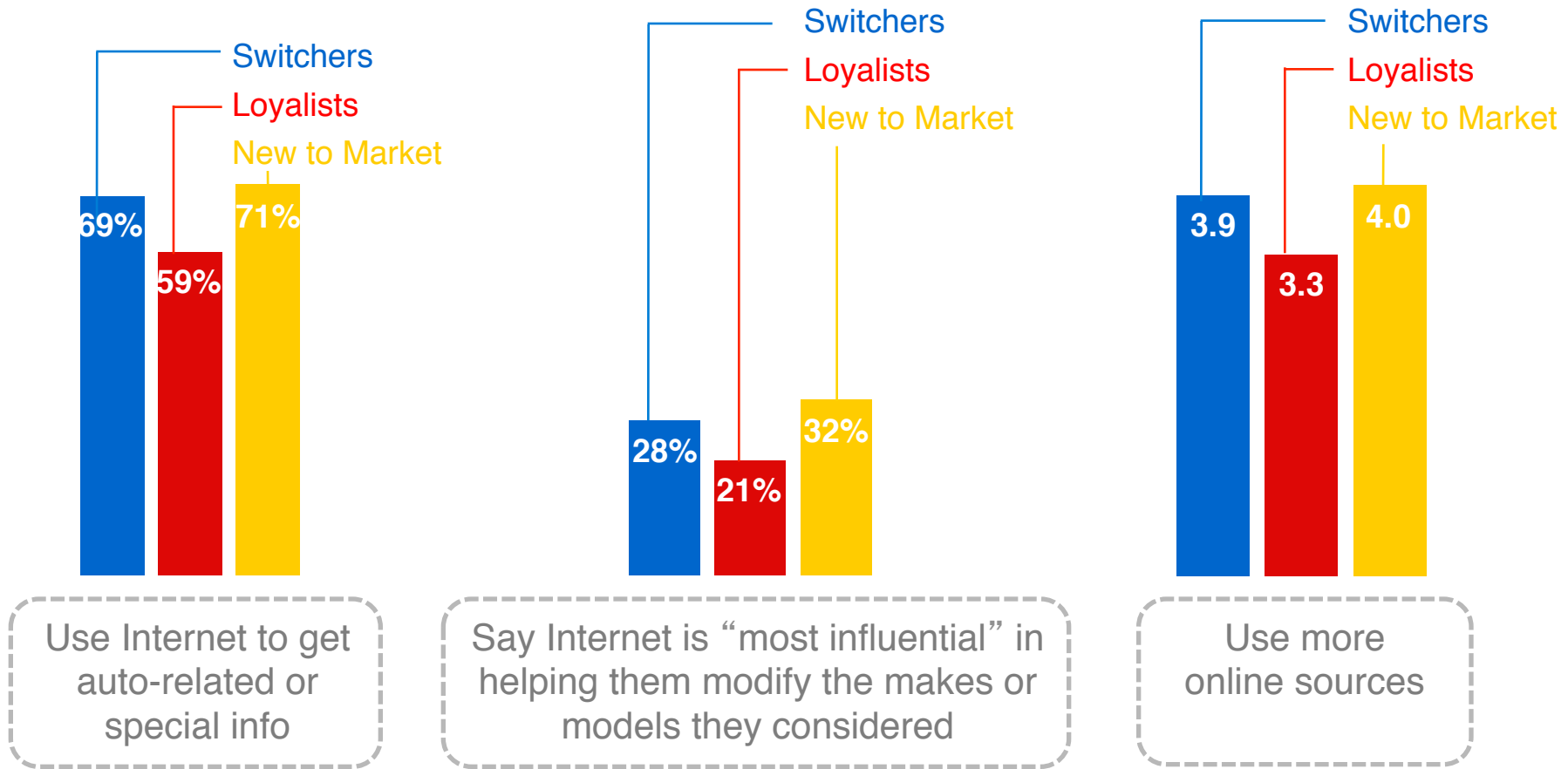
n=2641

BASE: All new car buyers who had exact idea

Over half are either **New to Market** or **Switch Brands**



“Switchers” and those **New to Market** Are More Likely to Use Internet

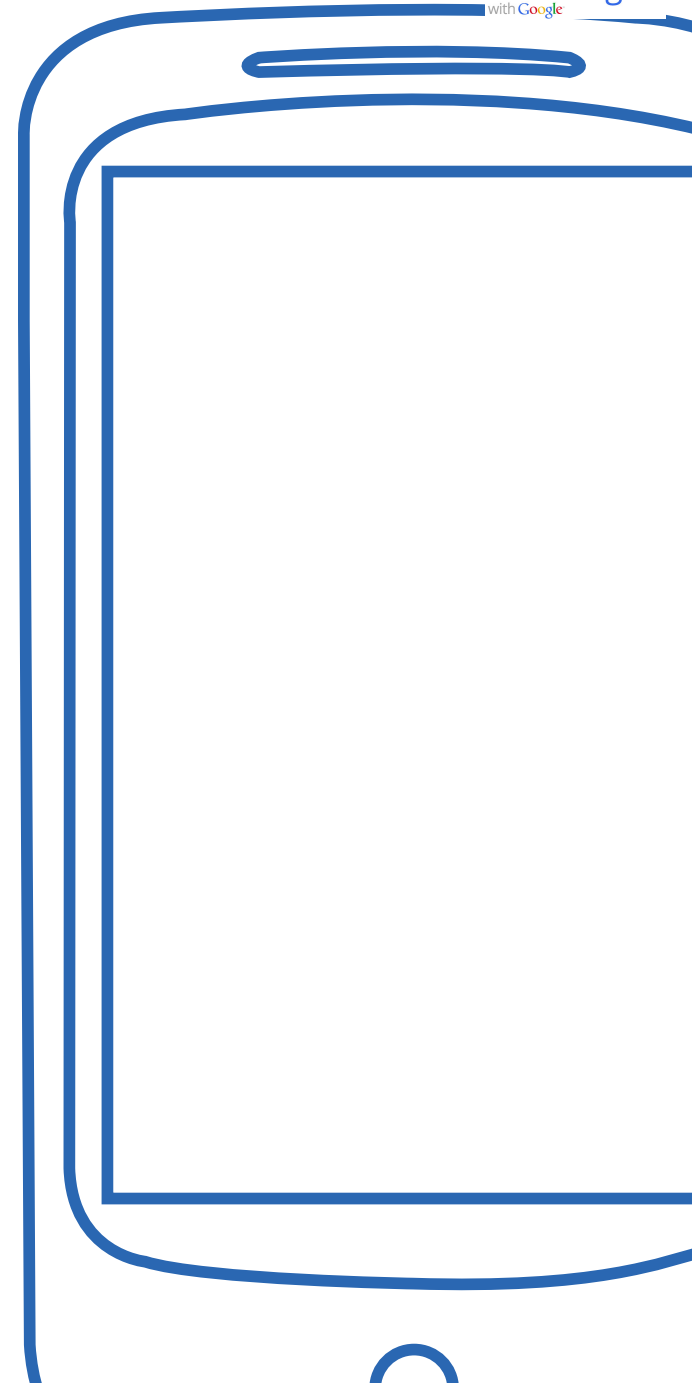


Switchers n=4772
Base: All new car buyers who
switched to a new brand

Loyalists n=4085
Base: All new car buyers who
stay loyal to previous brand

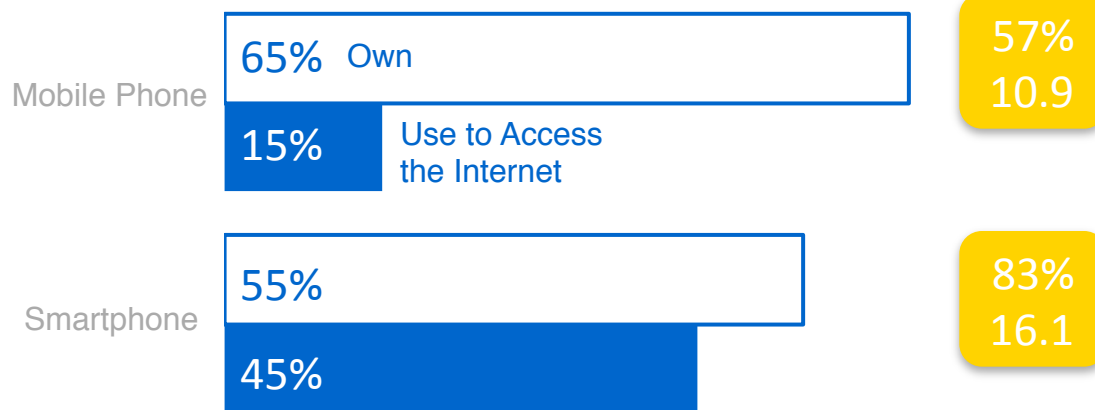
New to Market n=1645
Base: All new car buyers
who were first time buyers

MOBILE AUTO RESEARCH



Mobile Ownership and Use

XX% Who Use Device to Access Internet Daily
XX.X Average Number of Mobile Internet Sessions per Week



Own

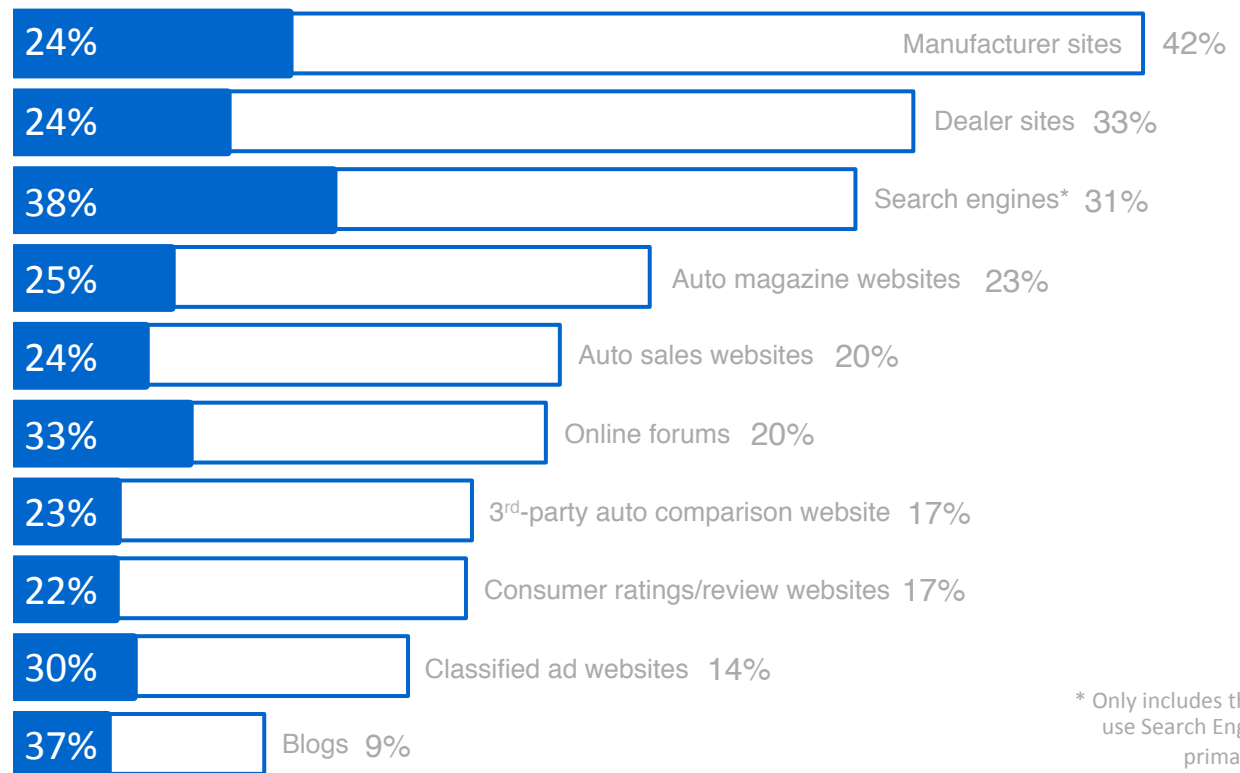


Use to Access the Internet

Many Use Mobile Devices To Access Online Sources

Among Those Who Use Source, Percent***
Who Use Source on Mobile Device

Percent** Who Use Source



* Only includes those who use Search Engines as a primary source

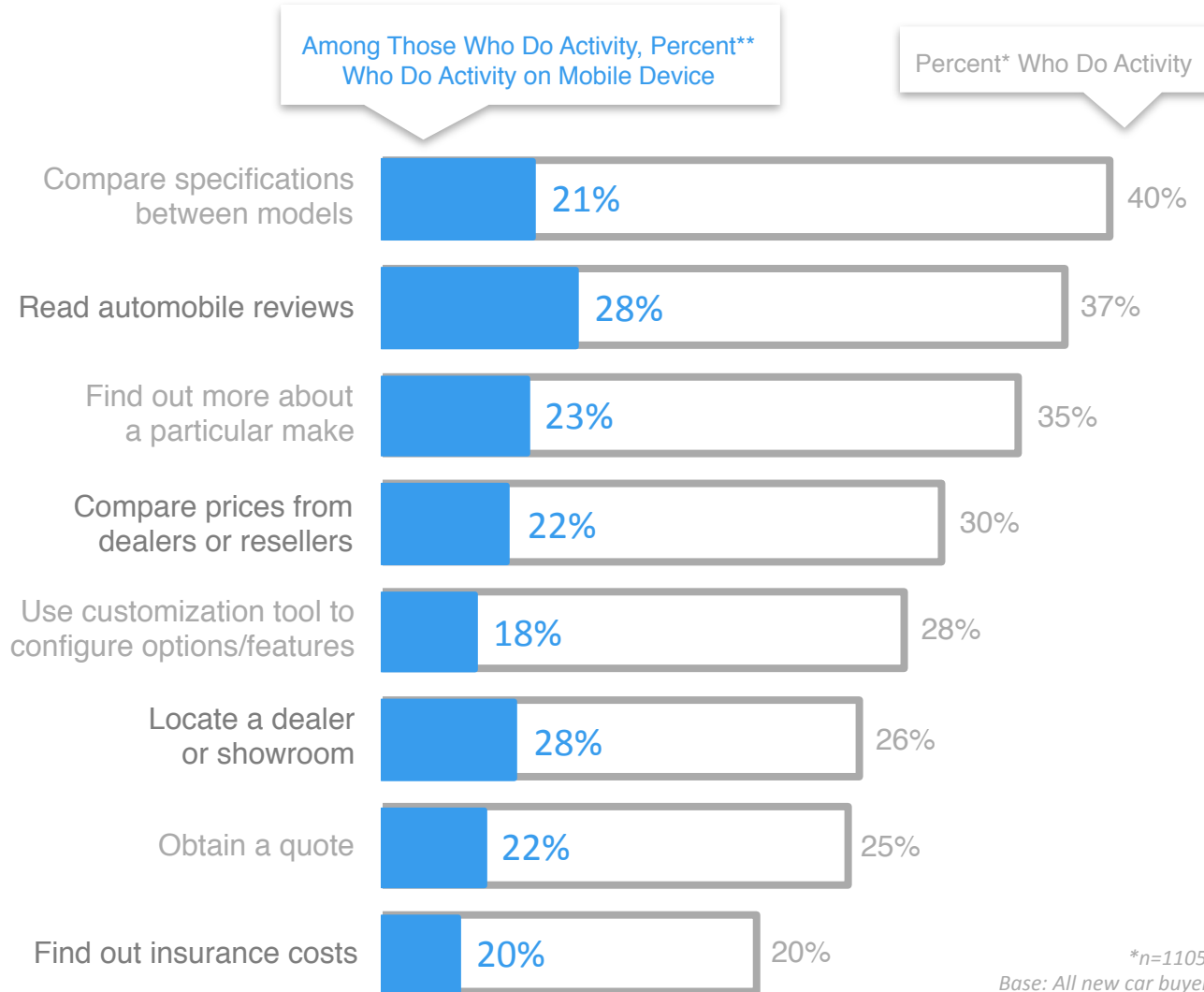
**n=11056

Base: All new car buyers

***n varies: 410 to 4602

Base: All new car buyers who used the online source

Many Already Use Mobile Devices for Key Activities



28%

Read automobile reviews

28%

Locate a Dealer or Showroom

23%

Find out more about a particular make

*n=11056

Base: All new car buyers

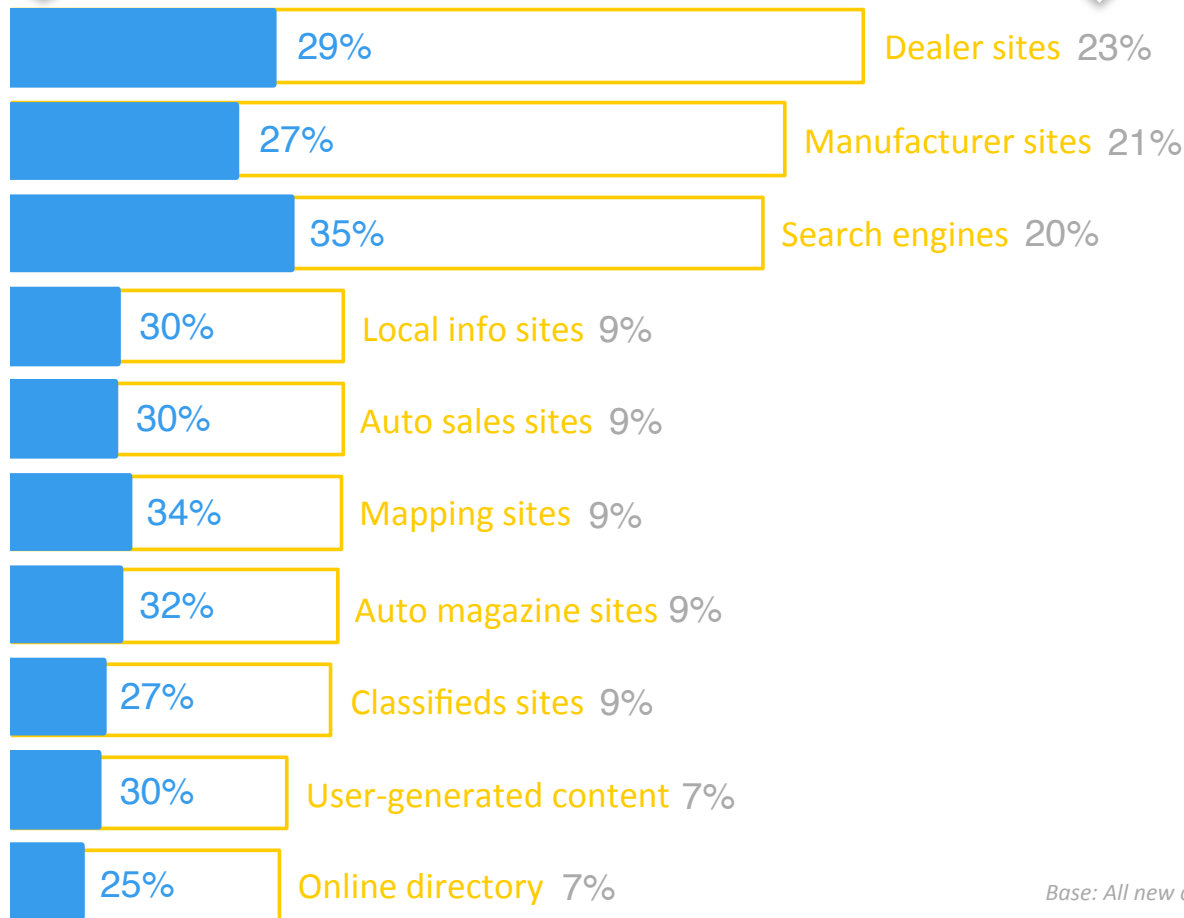
**n varies: 2257 to 4391

Base: All new car buyers who did the activity

Many Already Use Mobile Devices to Select and Locate Sellers

Among Those Who Use Source, Percent**
Who Use Source on Mobile Device

Percent* Who Use Source



*n=11056

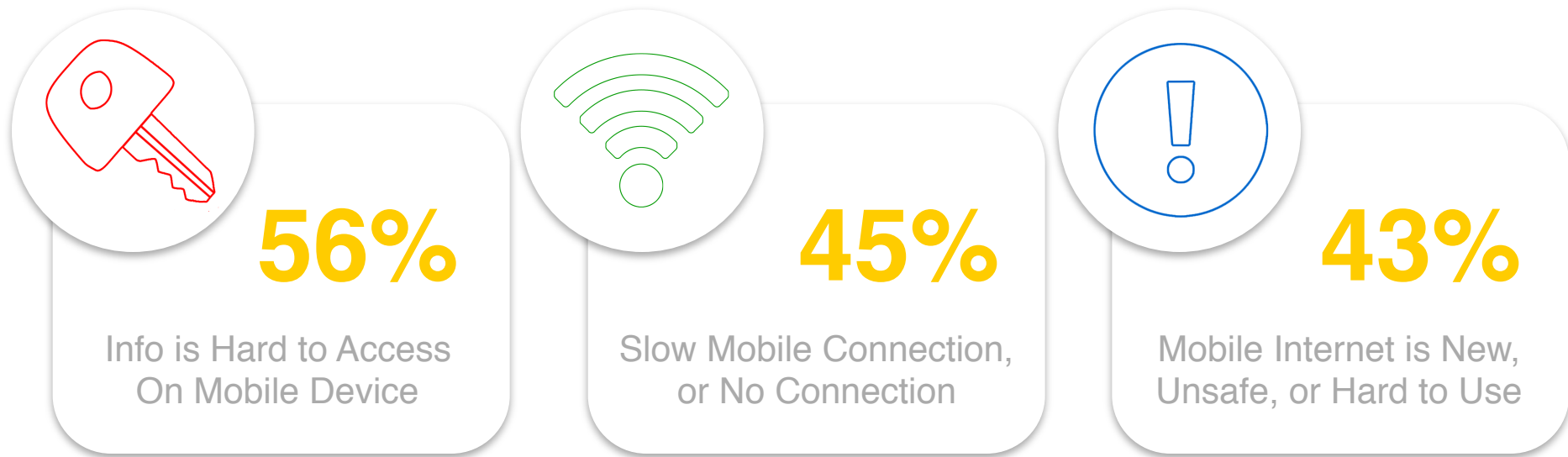
Base: All new car buyers

**n varies:789to 2507

Base: All new car buyers who used
the online source



Barriers to Using Mobile Devices for Auto Research



n=1262

Base: All new car buyers who didn't use their mobile device for online sources or activities

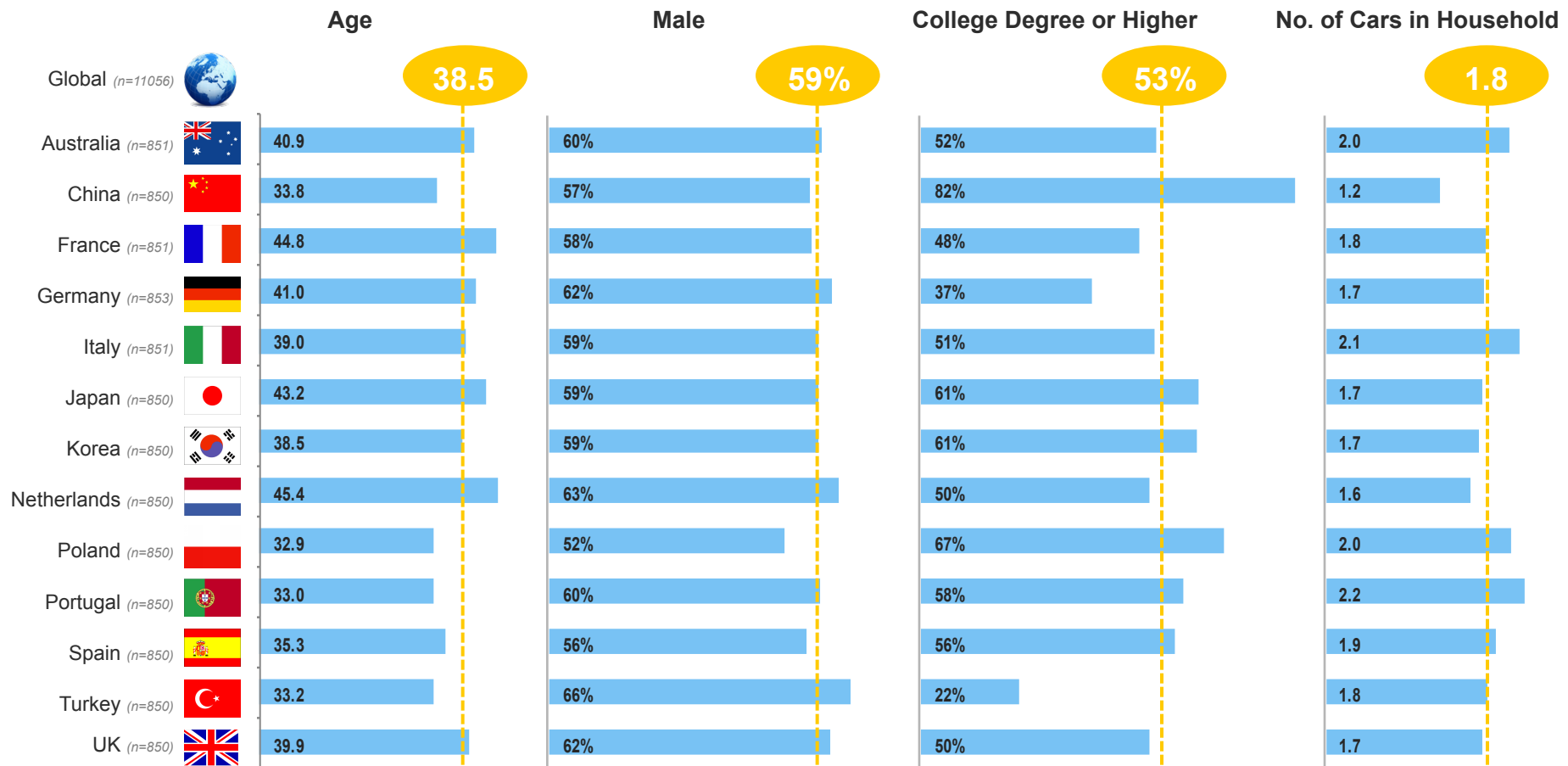
Data Library

Demographics of New Car Buyers

- Summary of the Purchase Journey
- Online versus Traditional and In-Person Sources
- Role of the Internet at Each Phase
- Role of Internet for Activities and Decision-Making
- Role of Search Engines
- Role of Online Video
- Role of Mobile Devices in Online Auto Research
- Brand Selection
- Luxury versus Volume Brands
- Brand Discoverers
- Purchase Location and Dealer/Seller Selection
- Response to Online Requests
- Dealer Visits

On average, new auto buyers are male and over half have college degrees

Demographics of New Automobile Buyers



Base: All new car buyers

Data Library

Demographics of New Car Buyers

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Role of the Internet at Each Phase

Role of Internet for Activities and Decision-Making

Role of Search Engines

Role of Online Video

Role of Mobile Devices in Online Auto Research

Brand Selection

Luxury versus Volume Brands

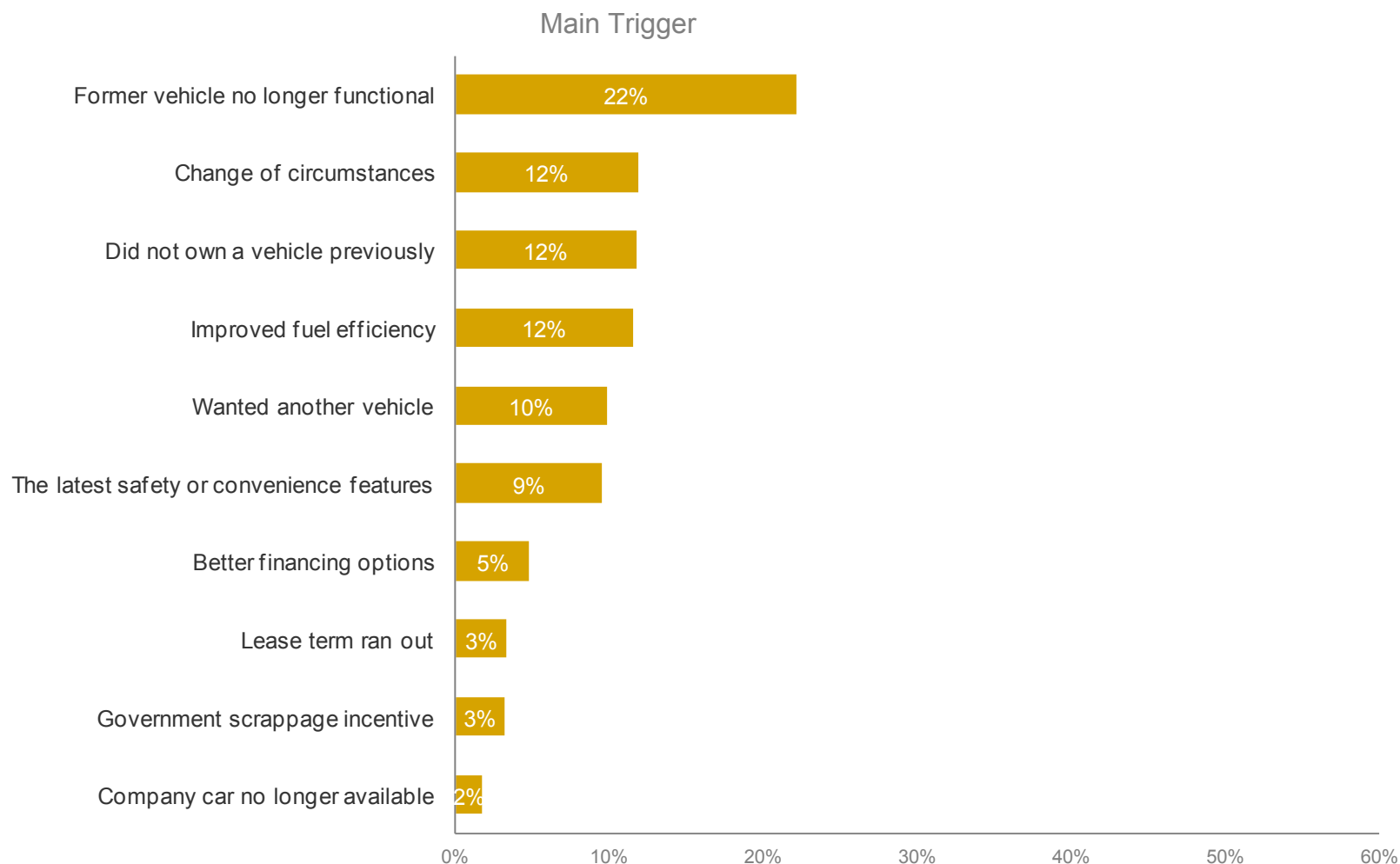
Brand Discoverers

Purchase Location and Dealer/Seller Selection

Response to Online Requests

Dealer Visits

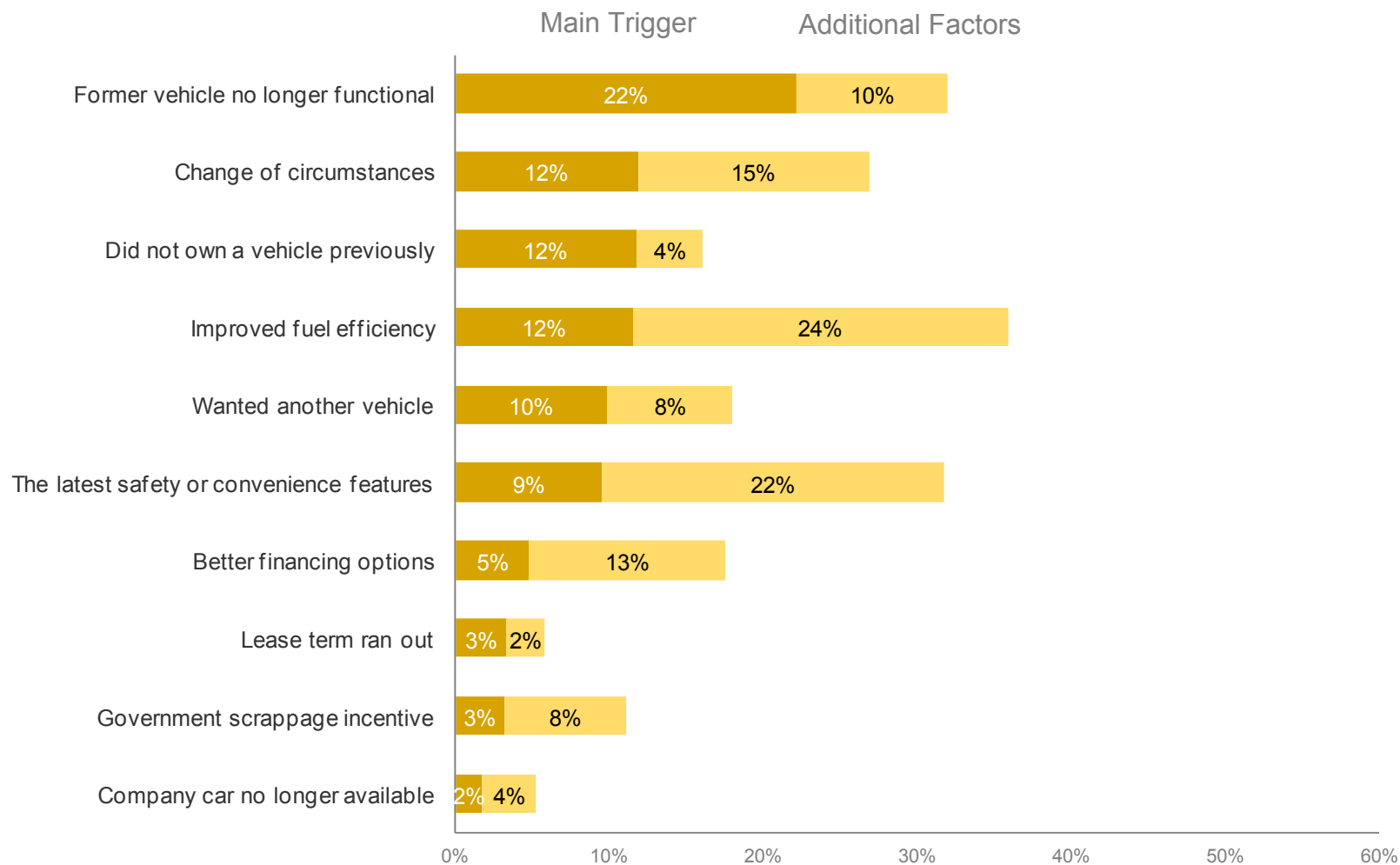
Replacing a older car “triggers” over 1 in 5 new car purchases



Q: What was the main trigger for the purchase of your vehicle?

n=11056
Base: All new car buyers

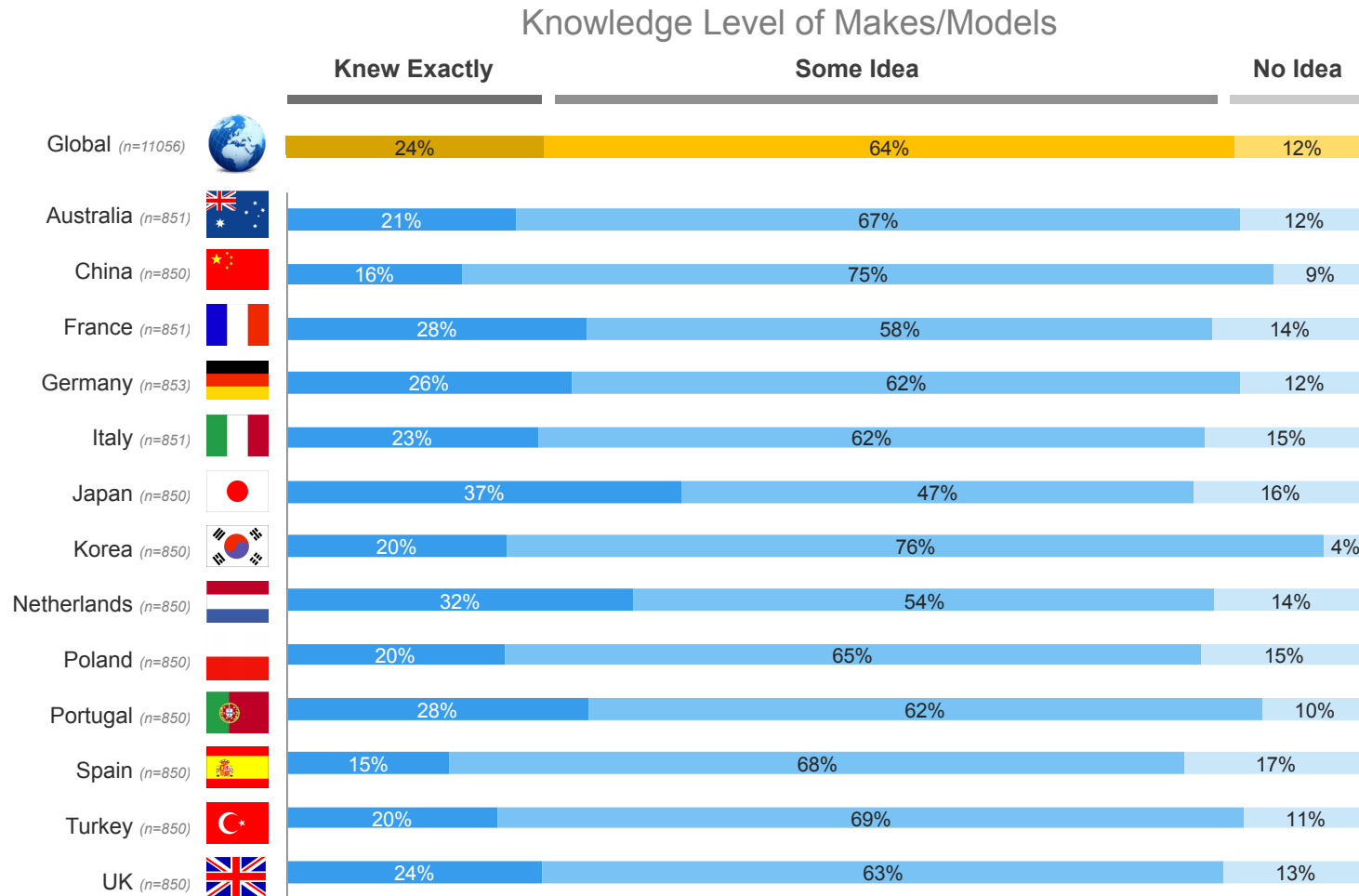
Improved fuel efficiency and latest safety or convenience features are other factors motivating a new purchase



Q: What was the main trigger for the purchase of your vehicle? / Which, if any, other factors encouraged you to purchase your vehicle?

n=11056
Base: All new car buyers

In all countries, most buyers have some idea of the make or model of vehicle they want at the start of research

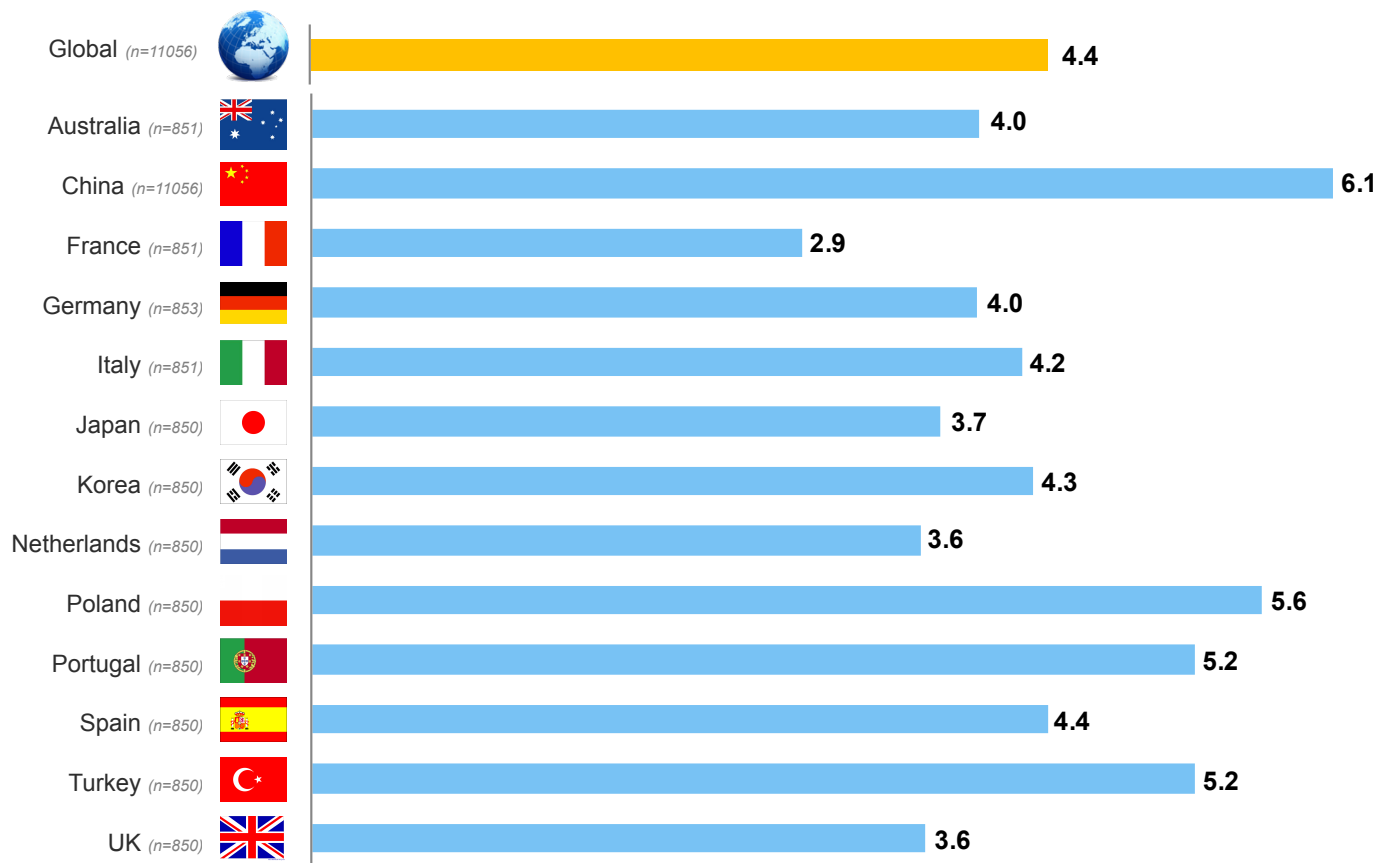


Q: Which of the following best describes how much you knew about the vehicle you ended up buying before you started to consider, compare or review your options?

Base: All new car buyers

Buyers in China spend the longest time in market, deciding what to buy; buyers in France spend the least time

Time In-Market: When Started Thinking to Final Purchase



Q: Please select the month when you first started thinking about buying the automobile. / In which month did you actually purchase the automobile?

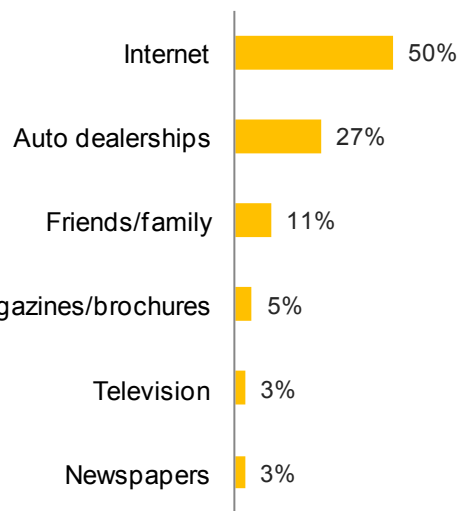
Base: All new car buyers

At the start of research, half go to the Internet first

Source Used First for Research



Global Average (n=11056)



		Internet	Auto dealerships	Friends, family, colleagues	Magazines/brochures	Television	Newspapers
Global (n=11056)		50%	27%	11%	5%	3%	3%
Australia (n=851)		56%	23%	8%	4%	3%	6%
China (n=850)		58%	10%	25%	4%	2%	1%
France (n=851)		37%	41%	9%	7%	2%	2%
Germany (n=853)		45%	38%	8%	4%	2%	2%
Italy (n=851)		39%	27%	15%	8%	6%	5%
Japan (n=850)		34%	35%	9%	12%	6%	2%
Korea (n=850)		45%	31%	14%	3%	4%	2%
Netherlands (n=850)		50%	29%	9%	5%	3%	3%
Poland (n=850)		59%	18%	14%	4%	2%	3%
Portugal (n=850)		58%	29%	7%	4%	1%	1%
Spain (n=850)		46%	30%	10%	5%	4%	4%
Turkey (n=11056)		63%	19%	12%	3%	1%	2%
UK (n=850)		56%	22%	9%	4%	3%	5%

Q: Please select the first place where you began searching in column 1. Then, in column 2, select any additional places where you looked.

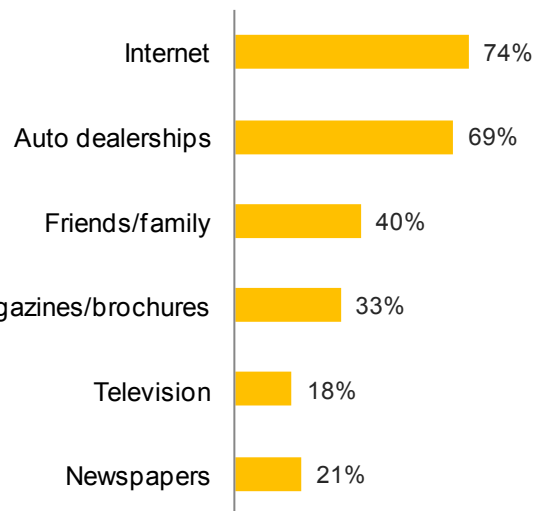
Base: All new car buyers

Auto dealerships are also important for buyers at the start of research

All Sources Used for Research



Global Average (n=11056)

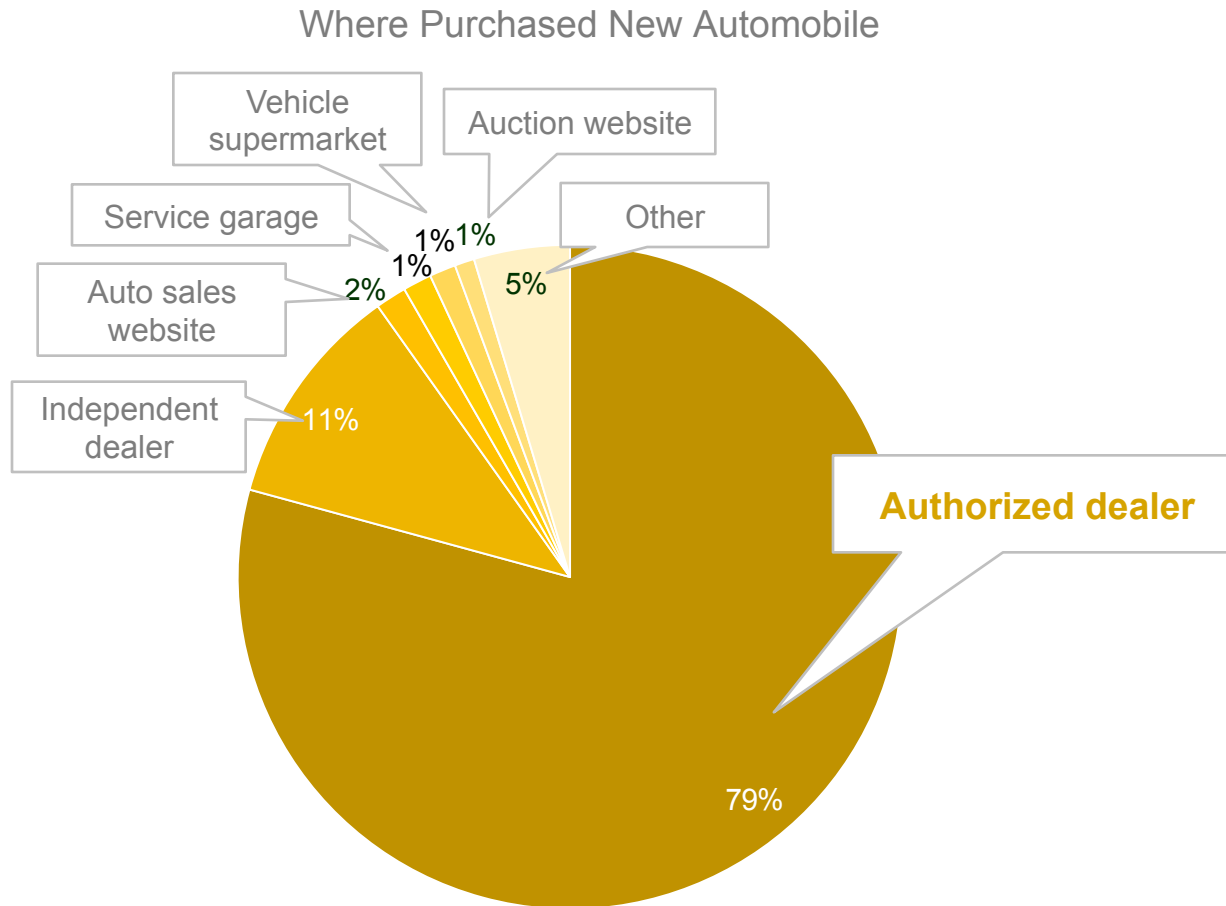


		Internet	Auto dealerships	Friends, family, colleagues	Magazines/brochures	Television	Newspapers
Global (n=11056)		74%	69%	40%	33%	18%	21%
Australia (n=851)		80%	67%	35%	30%	18%	31%
China (n=850)		83%	64%	73%	48%	30%	30%
France (n=851)		66%	75%	31%	32%	14%	18%
Germany (n=853)		71%	79%	32%	30%	15%	22%
Italy (n=851)		69%	69%	45%	39%	27%	31%
Japan (n=850)		62%	75%	24%	44%	15%	6%
Korea (n=850)		64%	63%	40%	15%	13%	10%
Netherlands (n=850)		70%	70%	27%	29%	12%	13%
Poland (n=850)		85%	61%	53%	37%	22%	35%
Portugal (n=850)		81%	74%	38%	37%	12%	13%
Spain (n=850)		71%	67%	41%	33%	22%	21%
Turkey (n=850)		83%	69%	47%	27%	17%	21%
UK (n=850)		76%	66%	35%	34%	18%	25%

Q: Please select the first place where you began searching in column 1. Then, in column 2, select any additional places where you looked.

Base: All new car buyers

The vast majority of buyers purchased their new car from an authorized dealership



Q: Where did you purchase the automobile?

Data Library

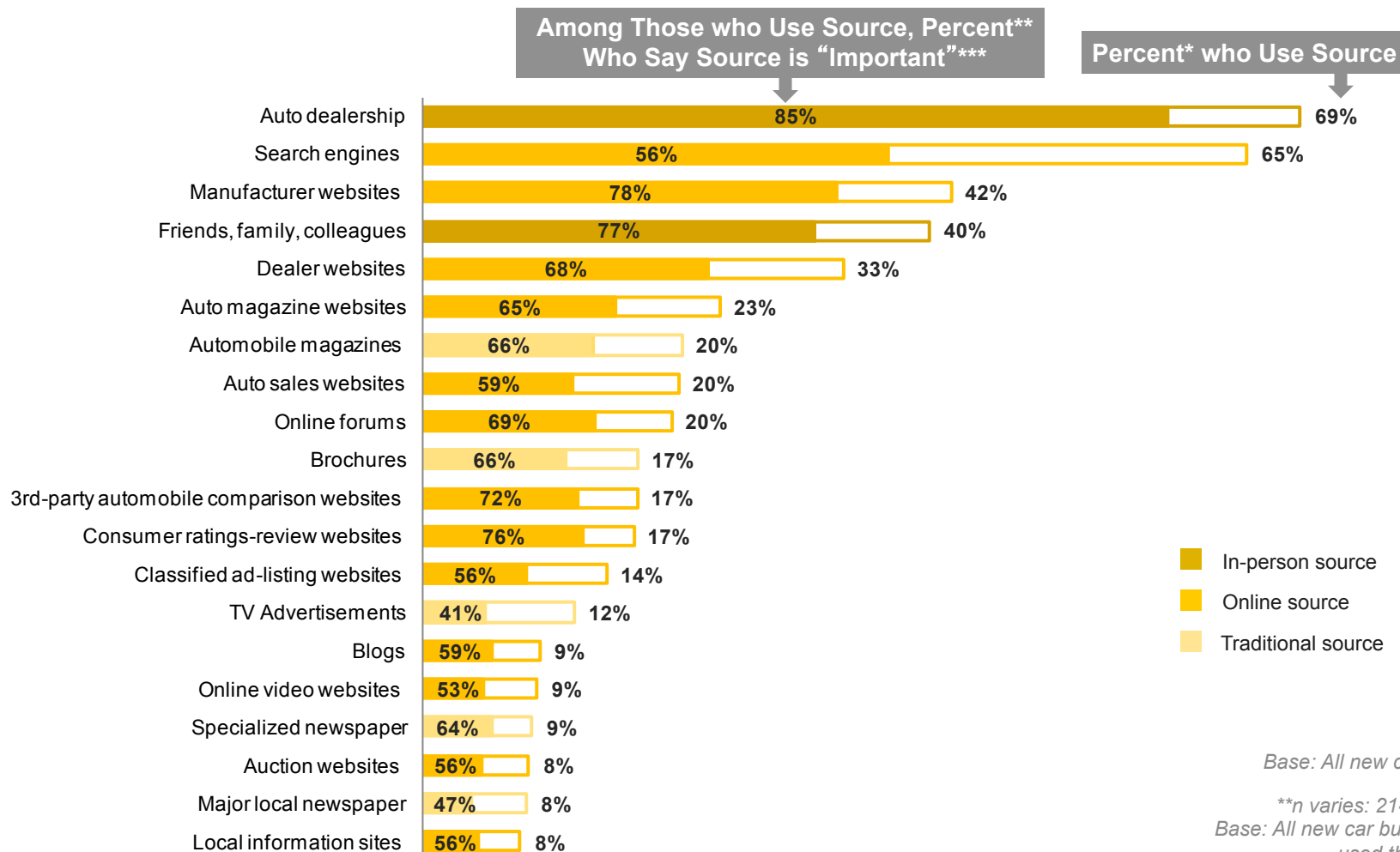
Demographics of New Car Buyers
Summary of the Purchase Journey

Online versus Traditional and In-Person Sources

Role of the Internet at Each Phase
Role of Internet for Activities and Decision-Making
Role of Search Engines
Role of Online Video
Role of Mobile Devices in Online Auto Research
Brand Selection
Luxury versus Volume Brands
Brand Discoverers
Purchase Location and Dealer/Seller Selection
Response to Online Requests
Dealer Visits

Overall, new car buyers mostly rely on auto dealerships, search engines and manufacturer websites

Global Top 20 Sources



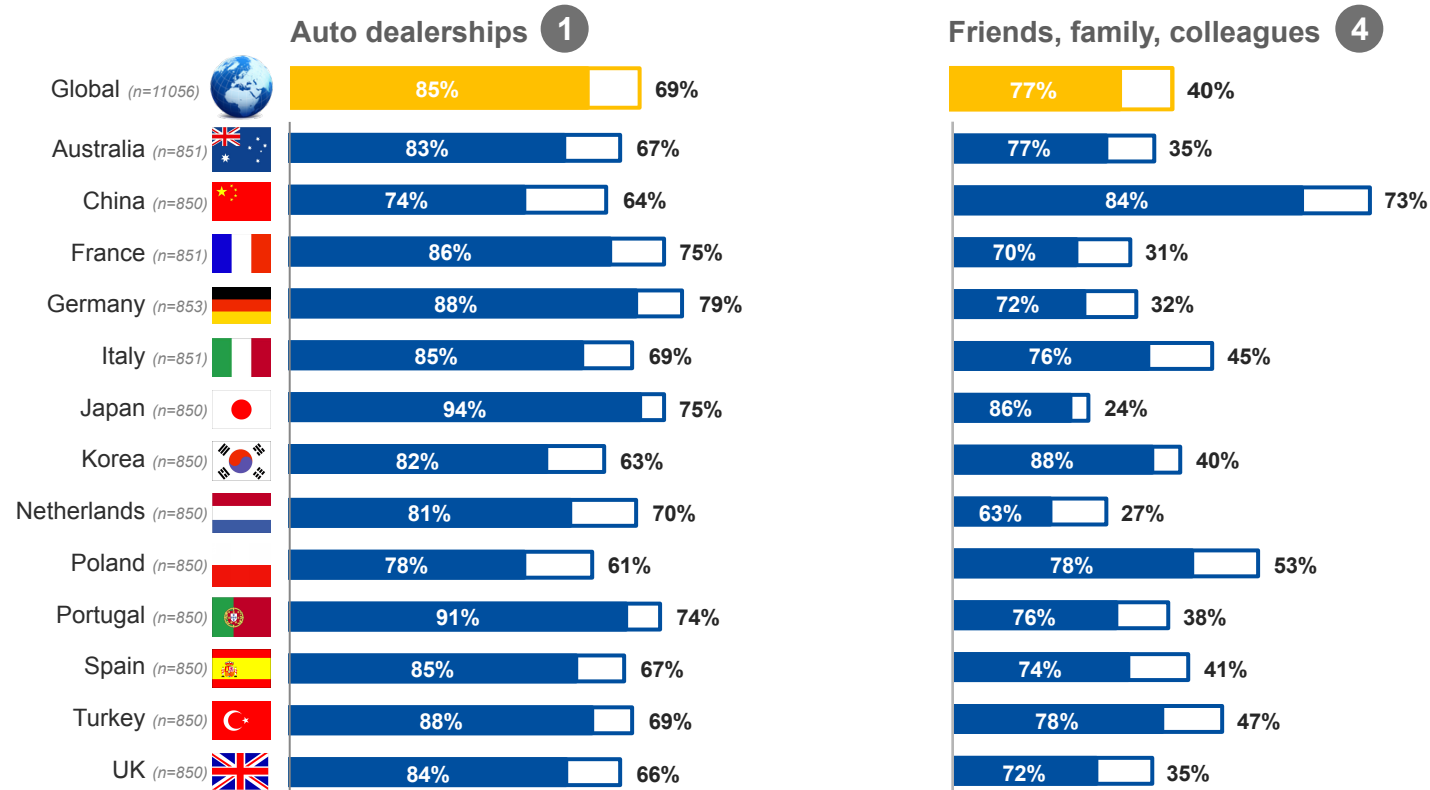
Q: Please select the first place where you began searching in column 1. Then, in column 2, select any additional places where you looked. / Which online sources of information did you use at any stage in researching and buying your automobile? / Thinking about your use of each source in the overall process, how would you rate its importance

Auto sales websites, 3rd-part auto comparison websites and consumer ratings/review websites were not asked in China

Source: The Role of the Internet in New Automobile Purchases, Global Analysis, December 2011, Netpop Research, LLC

German, French, and Japanese buyers are more likely to rely on auto dealerships, Chinese on friends and family

Top In-Person Sources



Among Those who Use Source, Percent**
Who Say Source is "Important"***

Percent* who Use Source

X Overall source ranking

*Base: All new car buyers

**Base: All new car buyers who used the source

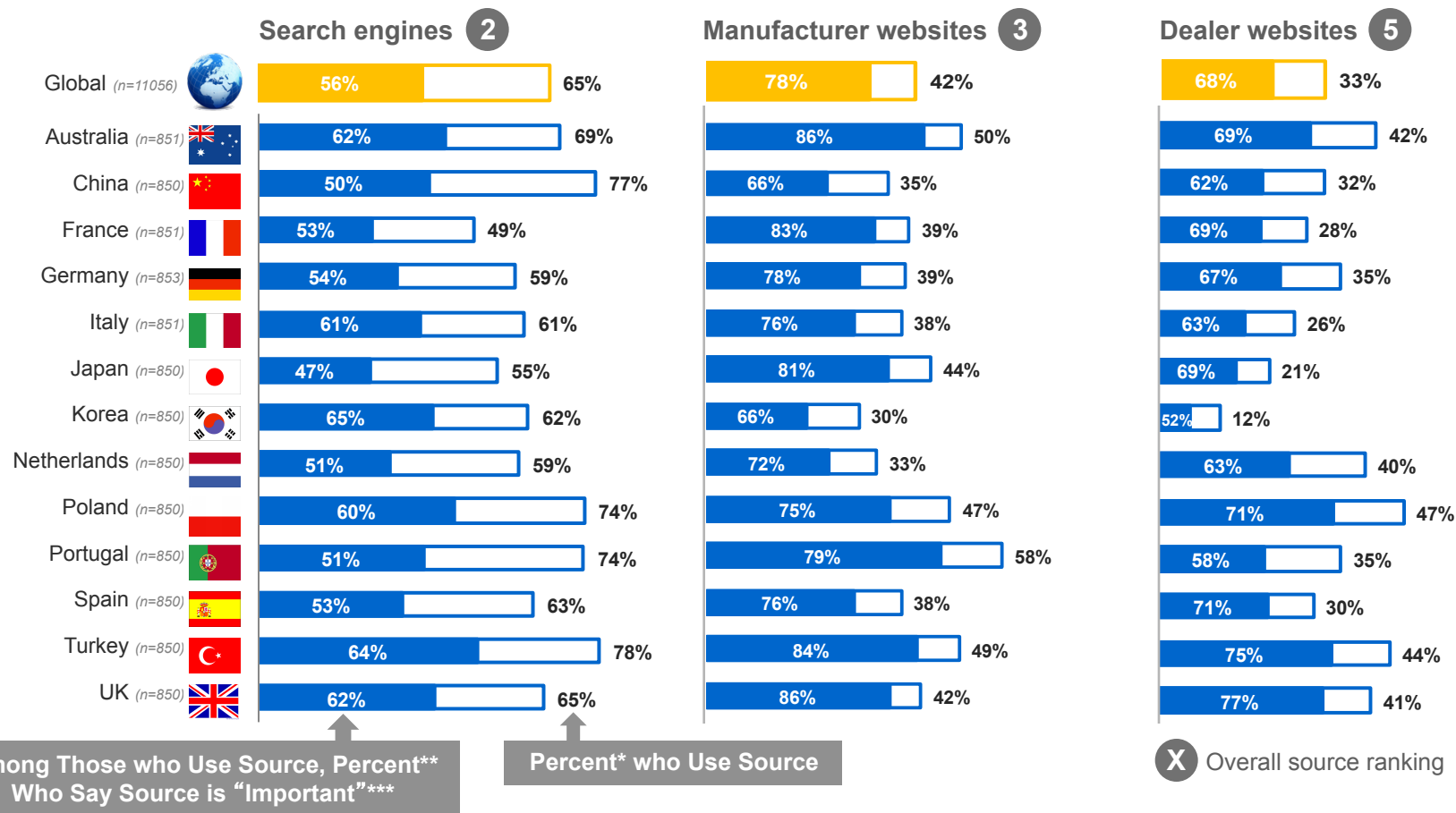
***Top 2 box scores (4, 5 on 5-pt. scale)

n Indicates the rank among all sources

Q: Please select the first place where you began searching in column 1. Then, in column 2, select any additional places where you looked. / Which online sources of information did you use at any stage in researching and buying your automobile? / Thinking about your use of each source in the overall process, how would you rate its importance

Half or more new car buyers use search engines to research in every country

Top Online Sources (1)



*Base: All new car buyers

**Base: All new car buyers who used the source

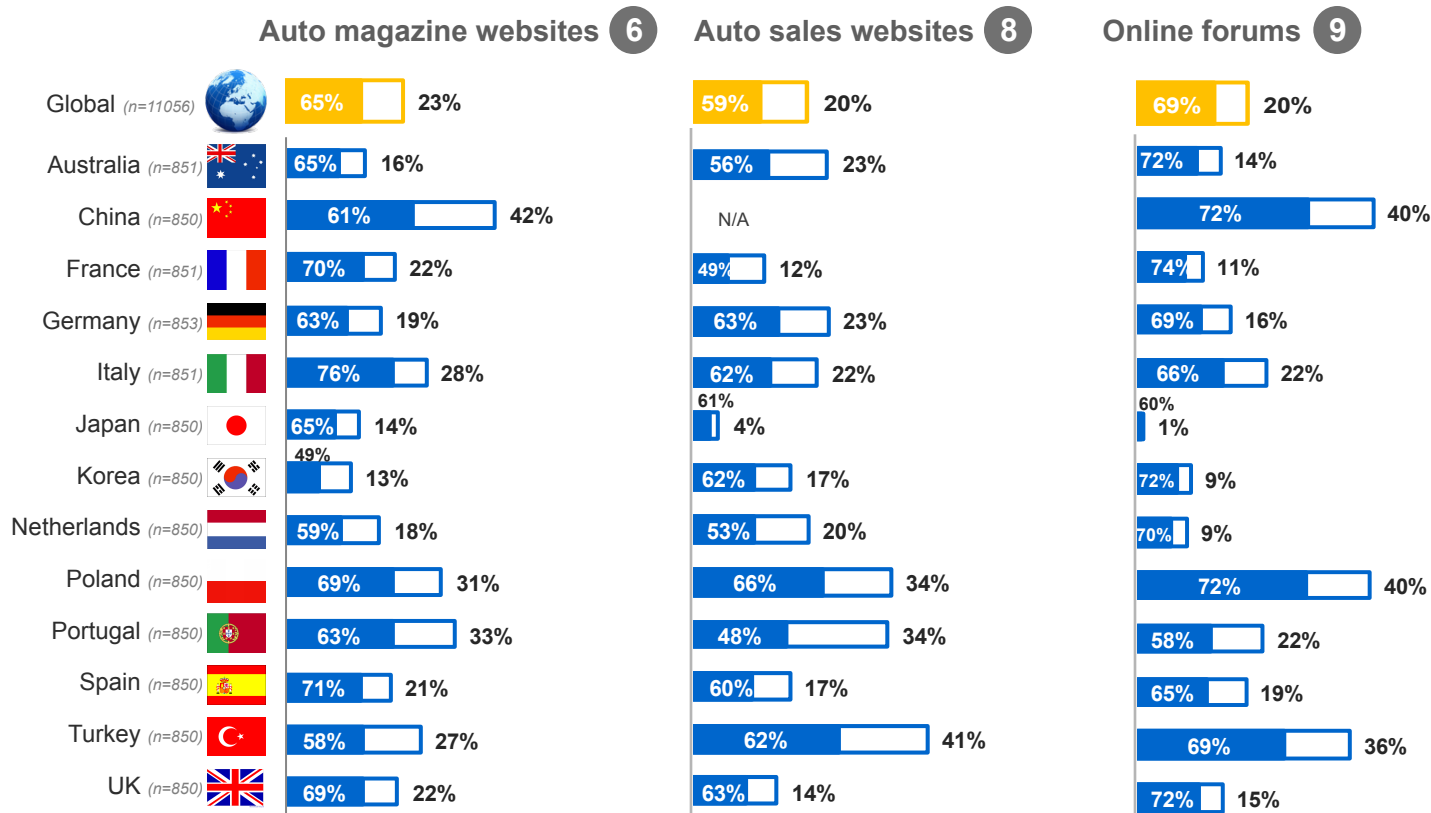
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Q: Please select the first place where you began searching in column 1. Then, in column 2, select any additional places where you looked. / Which online sources of information did you use at any stage in researching and buying your automobile? / Thinking about your use of each source in the overall process, how would you rate its importance

Buyers in China are more likely to use auto magazine websites

Top Online Sources (2)



Among Those who Use Source, Percent**
Who Say Source is "Important"***

Percent* who Use Source

X Overall source ranking

*Base: All new car buyers

**Base: All new car buyers who used the source

***Top 2 box scores (4, 5 on 5-pt. scale)

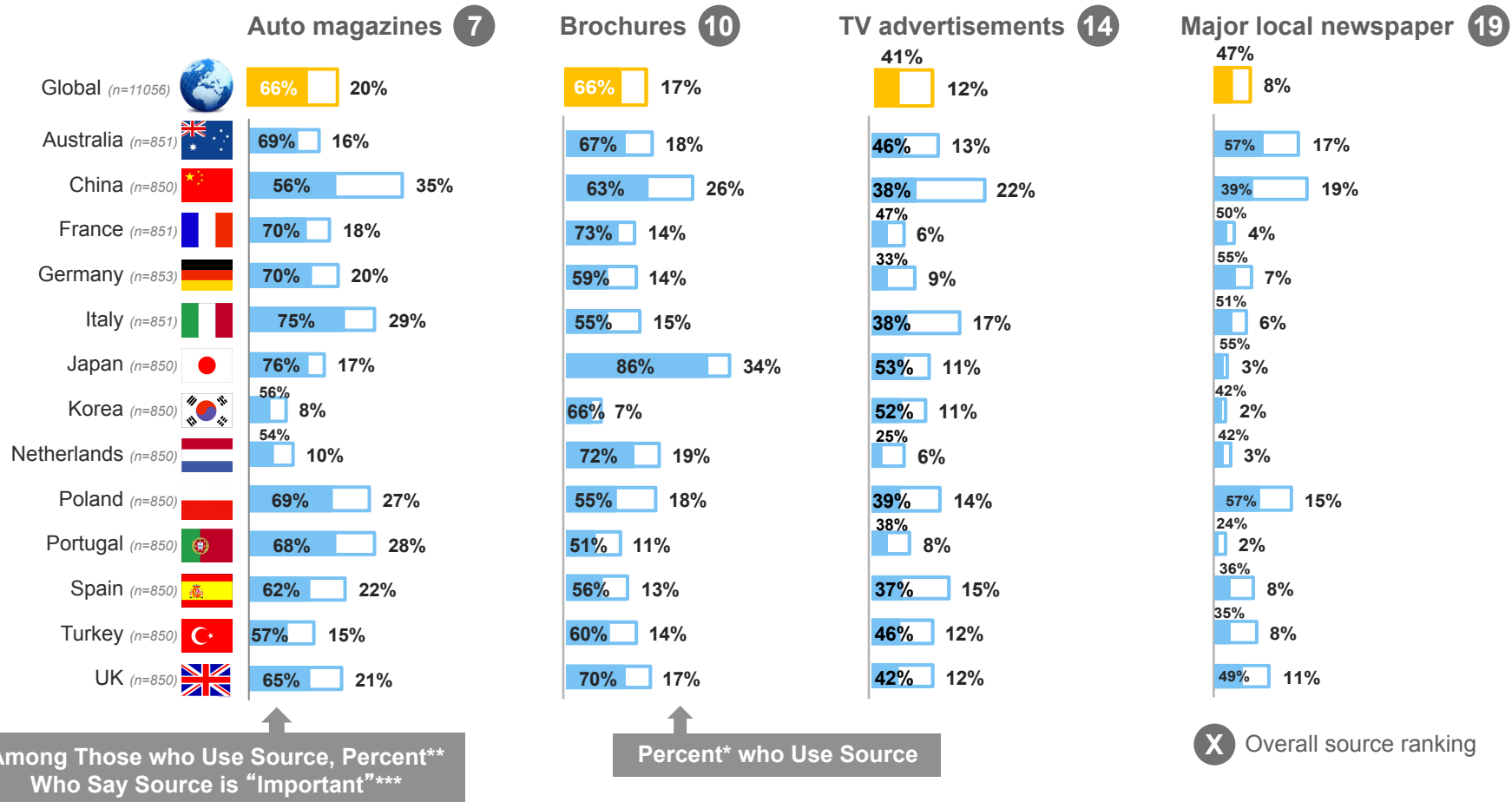
n Indicates the rank among all sources

Auto sales websites were not asked in China

Q: Please select the first place where you began searching in column 1. Then, in column 2, select any additional places where you looked. / Which online sources of information did you use at any stage in researching and buying your automobile? / Thinking about your use of each source in the overall process, how would you rate its importance

Generally, traditional sources are used less in every country

Top Traditional Sources

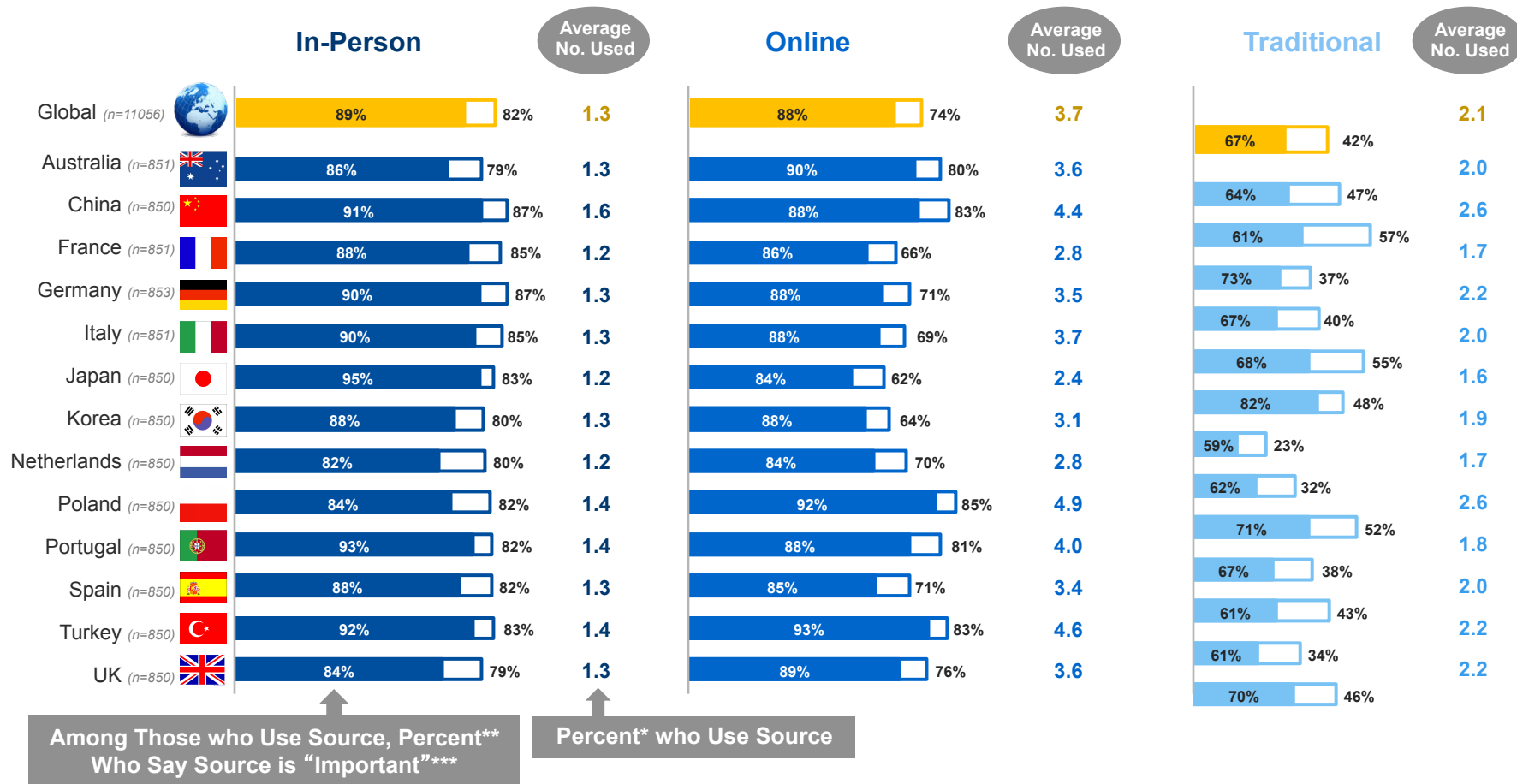


Q: Please select the first place where you began searching in column 1. Then, in column 2, select any additional places where you looked. / Which online sources of information did you use at any stage in researching and buying your automobile? / Thinking about your use of each source in the overall process, how would you rate its importance

*Base: All new car buyers
 **Base: All new car buyers who used the source
 ***Top 2 box scores (4, 5 on 5-pt. scale)
 n Indicates the rank among all sources

Buyers in China, Poland, Portugal, and Turkey tend to use more online sources

Use and Importance of Sources



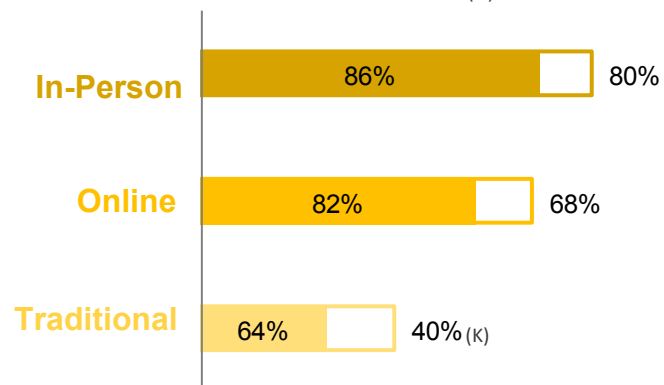
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Base: All new car buyers

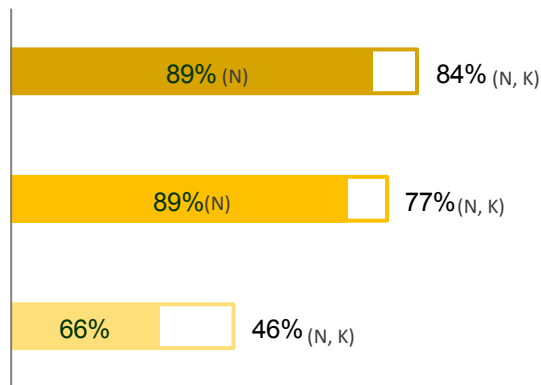
Buyers who have “some idea” of the make/model they want to buy use more online sources and spend more time in market

Use and Importance of Each Type of Source

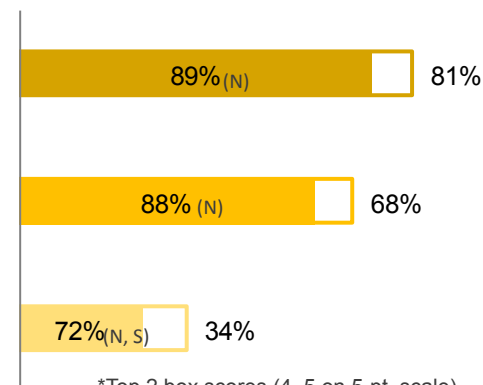
“No Idea” (N)



“Some Idea” (S)

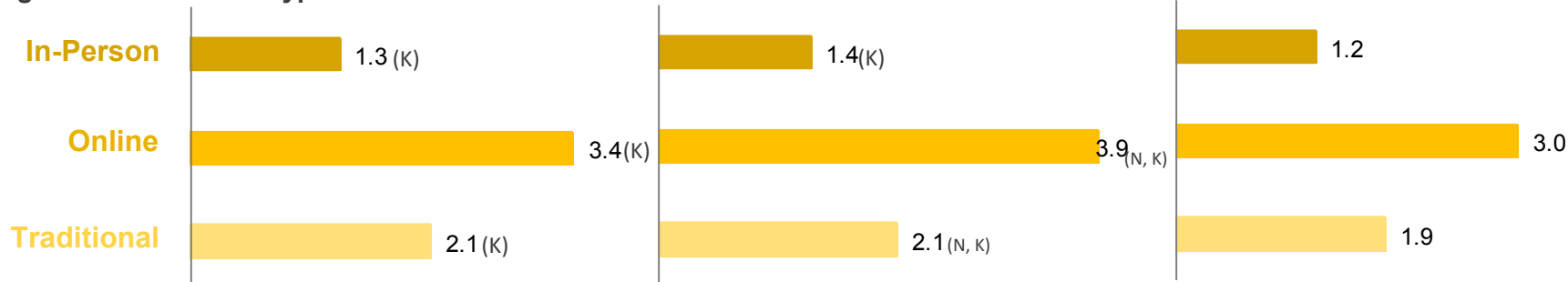


“Know Exactly” (K)



*Top 2 box scores (4, 5 on 5-pt. scale)

Average Number of Each Type of Source Used



Total Time
Spent Deciding

4.4

Months

(K)

4.7

Months

(N, K)

3.6

Months

Initial in parentheses indicates its group has a smaller value than the group where it appears, and the difference is statistically significant at the 95% confidence level

n varies: 543 to 5891
Base: New car buyers who used each type of source

Data Library

Demographics of New Car Buyers

Summary of the Purchase Journey

Online versus Traditional and In-Person Sources

Role of the Internet at Each Phase

Role of Internet for Activities and Decision-Making

Role of Search Engines

Role of Online Video

Role of Mobile Devices in Online Auto Research

Brand Selection

Luxury versus Volume Brands

Brand Discoverers

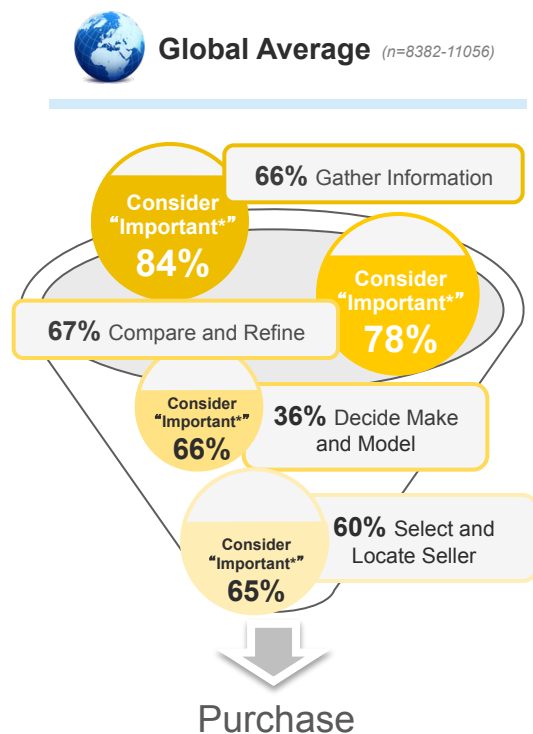
Purchase Location and Dealer/Seller Selection

Response to Online Requests

Dealer Visits

The Internet is used by a third or more new car buyers, in every country, at every research phase

Percent Who Use Internet at Each Phase



		Gather Information		Compare & Refine		Decide Make and Model		Select and locate seller	
		Use	Importance	Use	Importance	Use	Importance	Use	Importance
Global (n=8382-11056)		66%	84%	67%	78%	36%	66%	60%	65%
Australia (n=648-851)		73%	85%	73%	78%	42%	70%	64%	66%
China (n=673-850)		73%	87%	78%	86%	49%	69%	83%	72%
France (n=648-851)		57%	75%	57%	76%	28%	58%	52%	46%
Germany (n=610-853)		63%	81%	66%	72%	32%	62%	52%	62%
Italy (n=632-851)		59%	82%	62%	77%	33%	62%	60%	67%
Japan (n=749-850)		52%	84%	45%	80%	20%	56%	32%	56%
Korea (n=597-850)		59%	81%	63%	83%	29%	77%	58%	62%
Netherlands (n=593-850)		64%	78%	67%	67%	29%	50%	50%	50%
Poland (n=653-850)		76%	85%	82%	78%	54%	64%	77%	72%
Portugal (n=688-850)		75%	93%	71%	80%	33%	63%	52%	67%
Spain (n=600-850)		63%	82%	63%	77%	35%	62%	64%	67%
Turkey (n=618-850)		82%	92%	71%	88%	64%	77%	60%	77%
UK (n=651-850)		68%	82%	69%	74%	45%	71%	65%	70%

Base: All new car buyers who used sources to research at this phase

*Top 2 box scores (4, 5 on 5-pt. scale)

Q: Which of the following sources of information did you use for each of the following activities related to researching and buying your automobile?

In almost all countries, **search engines** are used more than other sources to gather information

Top Sources Used to Gather Information



Global Average (n=9737)

66%

Gather Information

67%

Compare and Refine

36%

Decide Make and Model

60%

Select and Locate Seller

Purchase

		Search engines	Auto dealerships	Manufacturer websites	Friends, family, colleagues	Dealer websites	Auto magazine websites	Auto magazines	Online forums	Auto sales websites	Brochures
Global (n=9737)		55%	41%	28%	27%	19%	14%	12%	12%	11%	9%
Australia (n=753)		59%	39%	35%	26%	25%	9%	9%	9%	14%	11%
China (n=773)		62%	31%	19%	48%	16%	22%	19%	24%	N/A	12%
France (n=730)		41%	49%	28%	19%	16%	13%	11%	7%	7%	7%
Germany (n=712)		49%	48%	26%	22%	18%	11%	12%	9%	13%	7%
Italy (n=753)		51%	33%	18%	31%	13%	15%	14%	12%	12%	8%
Japan (n=795)		46%	58%	34%	18%	13%	9%	12%	1%	2%	23%
Korea (n=695)		54%	34%	18%	28%	6%	6%	4%	6%	8%	3%
Netherlands (n=701)		54%	40%	25%	18%	24%	11%	6%	6%	10%	10%
Poland (n=755)		60%	36%	28%	36%	23%	17%	14%	23%	18%	10%
Portugal (n=779)		69%	40%	40%	26%	23%	21%	19%	14%	21%	7%
Spain (n=741)		53%	44%	27%	25%	17%	10%	12%	11%	8%	7%
Turkey (n=793)		65%	43%	32%	32%	25%	17%	9%	22%	23%	8%
UK (n=757)		56%	42%	31%	23%	25%	14%	11%	9%	7%	10%

Base: All new car buyers who used sources to gather information

Auto sales websites were not asked in China

Q: Which of the following sources of information did you use for each of the following activities related to researching and buying your automobile? / Which methods did you typically use to find the websites you used during your purchase process?

Source: The Role of the Internet in New Automobile Purchases, Global Analysis, December 2011, Netpop Research, LLC

In most of countries, **search engines** are used more than other sources to compare and refine options

Top Sources Used to Compare and Refine



Global Average (n=9342)

66%

Gather Information

Compare and Refine

67%

36%

Decide Make and Model

Select and Locate Seller

60%

Purchase

		Search engines	Auto dealerships	Manufacturer websites	Dealer websites	Friends, family, colleagues	Auto magazine websites	Online forums	Automobile magazines	Auto sales websites	3rd-party vehicle comparison websites
Global (n=9342)		56%	38%	25%	18%	17%	12%	11%	11%	10%	10%
Australia (n=722)		58%	36%	30%	23%	13%	9%	7%	7%	13%	12%
China (n=770)		61%	36%	19%	16%	30%	21%	24%	18%	N/A	0%
France (n=687)		42%	42%	22%	14%	11%	12%	6%	10%	7%	5%
Germany (n=695)		51%	44%	25%	20%	13%	10%	9%	9%	13%	13%
Italy (n=730)		51%	35%	23%	13%	17%	15%	11%	16%	9%	11%
Japan (n=749)		40%	57%	26%	10%	13%	5%	0%	9%	2%	8%
Korea (n=740)		57%	36%	17%	6%	18%	7%	5%	4%	11%	9%
Netherlands (n=624)		53%	40%	20%	25%	11%	10%	5%	5%	12%	12%
Poland (n=775)		64%	27%	23%	25%	15%	15%	19%	12%	19%	20%
Portugal (n=713)		61%	45%	39%	16%	17%	20%	12%	17%	12%	0%
Spain (n=737)		54%	38%	19%	16%	20%	11%	12%	12%	9%	10%
Turkey (n=709)		69%	30%	29%	22%	21%	14%	21%	7%	22%	20%
UK (n=691)		58%	34%	27%	23%	16%	12%	10%	11%	7%	14%

Q: Which of the following sources of information did you use for each of the following activities related to researching and buying your automobile? / Which methods did you typically use to find the websites you used during your purchase process?

Base: All new car buyers who used sources to compare and refine

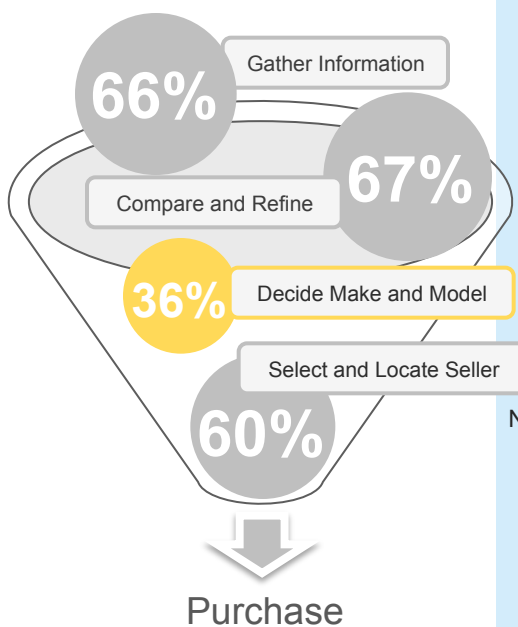
Auto sales websites were not asked in China

In almost every country, auto dealership are used more than other sources to decide makes and models

Top Sources Used to Decide Make and Model



Global Average (n=8382)



		Auto dealerships	Search engines	Friends, family, colleagues	Manufacturer websites	Dealer websites	Brochures	Online forums	Automobile magazines	Consumer ratings-review websites	Auto magazine websites
Global (n=8382)		54%	26%	17%	12%	9%	4%	4%	4%	4%	3%
Australia (n=648)		52%	28%	11%	16%	12%	5%	2%	3%	6%	2%
China (n=673)		36%	33%	41%	9%	10%	6%	10%	6%	N/A	8%
France (n=648)		61%	18%	12%	11%	6%	3%	2%	4%	1%	3%
Germany (n=610)		64%	20%	8%	8%	6%	1%	3%	3%	3%	2%
Italy (n=632)		54%	24%	13%	10%	5%	3%	5%	6%	3%	6%
Japan (n=771)		68%	16%	13%	12%	4%	11%	0%	3%	1%	2%
Korea (n=597)		53%	24%	22%	6%	3%	2%	3%	2%	9%	2%
Netherlands (n=593)		63%	22%	10%	6%	12%	7%	2%	1%	3%	2%
Poland (n=653)		34%	35%	24%	13%	14%	3%	10%	5%	8%	3%
Portugal (n=688)		65%	25%	17%	16%	8%	2%	4%	5%	4%	4%
Spain (n=600)		52%	26%	17%	10%	10%	4%	4%	5%	3%	4%
Turkey (n=618)		49%	32%	20%	18%	14%	4%	7%	2%	3%	4%
UK (n=651)		46%	33%	10%	15%	13%	5%	4%	6%	5%	5%

Q: Which of the following sources of information did you use for each of the following activities related to researching and buying your automobile? / Which methods did you typically use to find the websites you used during your purchase process?

Base: All new car buyers who used sources to decide make and model

Auto sales websites were not asked in China

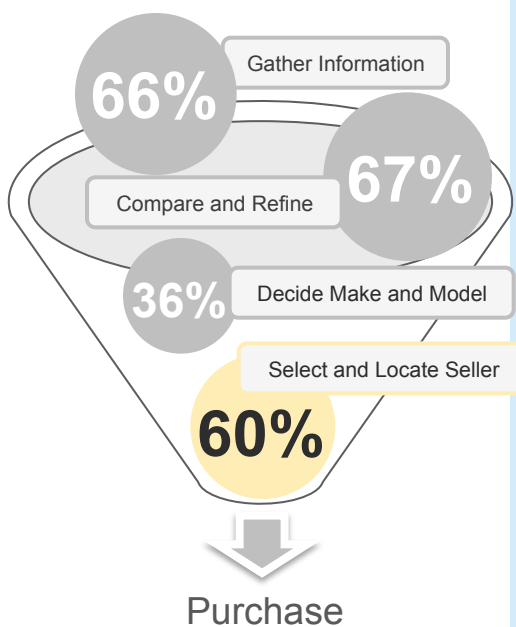
Source: The Role of the Internet in New Automobile Purchases, Global Analysis, December 2011, Netpop Research, LLC

In most of countries, **search engines** are used most to select and locate sellers

Top Sources Used to Select and Locate Seller



Global Average (n=11056)



		Search engines	Recommended by family or friends	Driven or walked past the dealer or seller	Dealer's websites	Purchased from the dealer in the past	Manufacturer websites	Newspaper or magazine ad	TV ad	Local information website	Auto sales website
Global (n=11056)		30%	25%	24%	23%	21%	21%	11%	10%	9%	9%
Australia (n=851)		34%	21%	36%	30%	19%	26%	16%	12%	12%	13%
China (n=850)		49%	44%	24%	26%	12%	26%	21%	20%	16%	N/A
France (n=851)		22%	17%	11%	21%	23%	18%	6%	5%	5%	5%
Germany (n=853)		24%	21%	23%	18%	30%	18%	9%	7%	6%	7%
Italy (n=851)		30%	28%	27%	19%	17%	18%	11%	9%	11%	10%
Japan (n=850)		15%	20%	22%	11%	31%	15%	5%	5%	2%	2%
Korea (n=850)		24%	41%	26%	13%	13%	14%	9%	9%	6%	13%
Netherlands (n=850)		26%	17%	27%	25%	24%	20%	10%	9%	6%	9%
Poland (n=850)		42%	22%	26%	31%	18%	26%	15%	14%	12%	15%
Portugal (n=850)		30%	25%	21%	22%	40%	22%	5%	5%	3%	7%
Spain (n=850)		30%	26%	24%	21%	14%	21%	12%	14%	13%	11%
Turkey (n=850)		34%	29%	23%	31%	14%	25%	12%	12%	11%	13%
UK (n=850)		34%	16%	26%	27%	22%	18%	11%	10%	11%	10%

Q: Which of the following sources of information did you use for each of the following activities related to researching and buying your automobile? / Which methods did you typically use to find the websites you used during your purchase process?

Base: All new car buyers who used sources to select and locate seller
Auto sales websites were not asked in China

Source: The Role of the Internet in New Automobile Purchases, Global Analysis, December 2011, Netpop Research, LLC

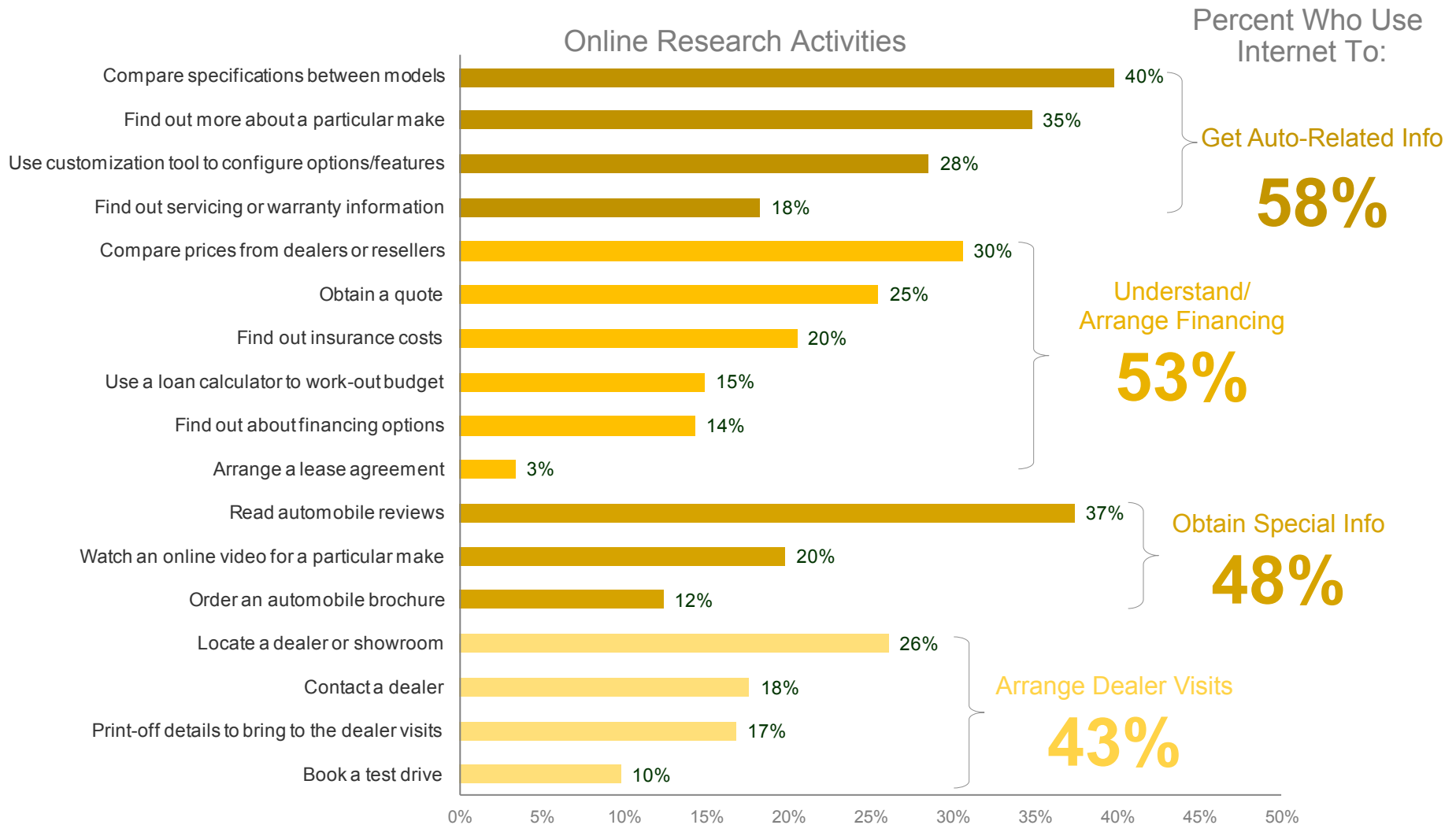
Data Library

Demographics of New Car Buyers
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Online versus Traditional and In-Person Sources
Role of the Internet at Each Phase

Role of Internet for Activities and Decision-Making

Role of Search Engines
Role of Online Video
Role of Mobile Devices in Online Auto Research
Brand Selection
Luxury versus Volume Brands
Brand Discoverers
Purchase Location and Dealer/Seller Selection
Response to Online Requests
Dealer Visits

Over half of new car buyers use the Internet to get auto-related information or arrange financing



n=11056

Base: All new car buyers

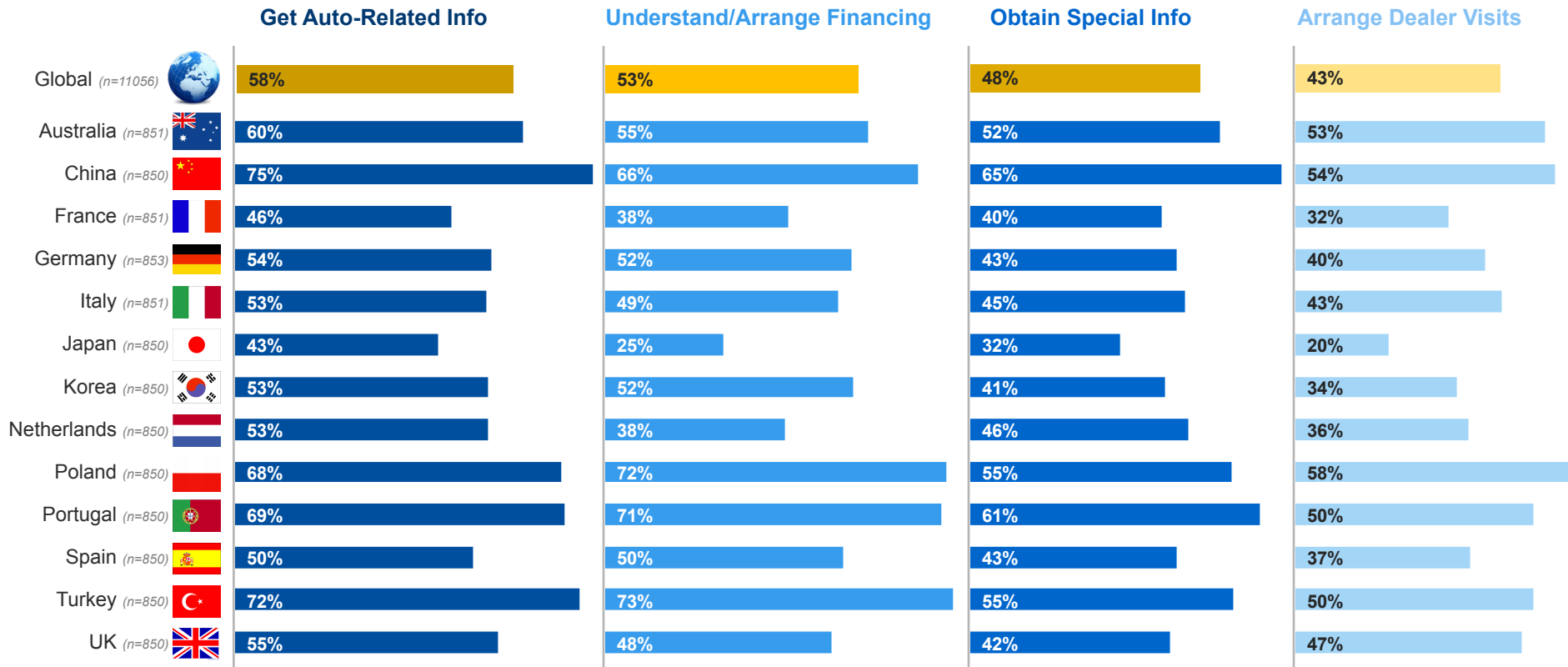
Q: Thinking about specific activities related to your final automobile purchase, what did you use the Internet to do?

"Arrange a lease agreement" was not asked in China

Source: The Role of the Internet in New Automobile Purchases, Global Analysis, December 2011, Netpop Research, LLC

Buyers in Australia, China, Poland, Portugal, and Turkey are more likely to conduct research activities online

Online Research Activities



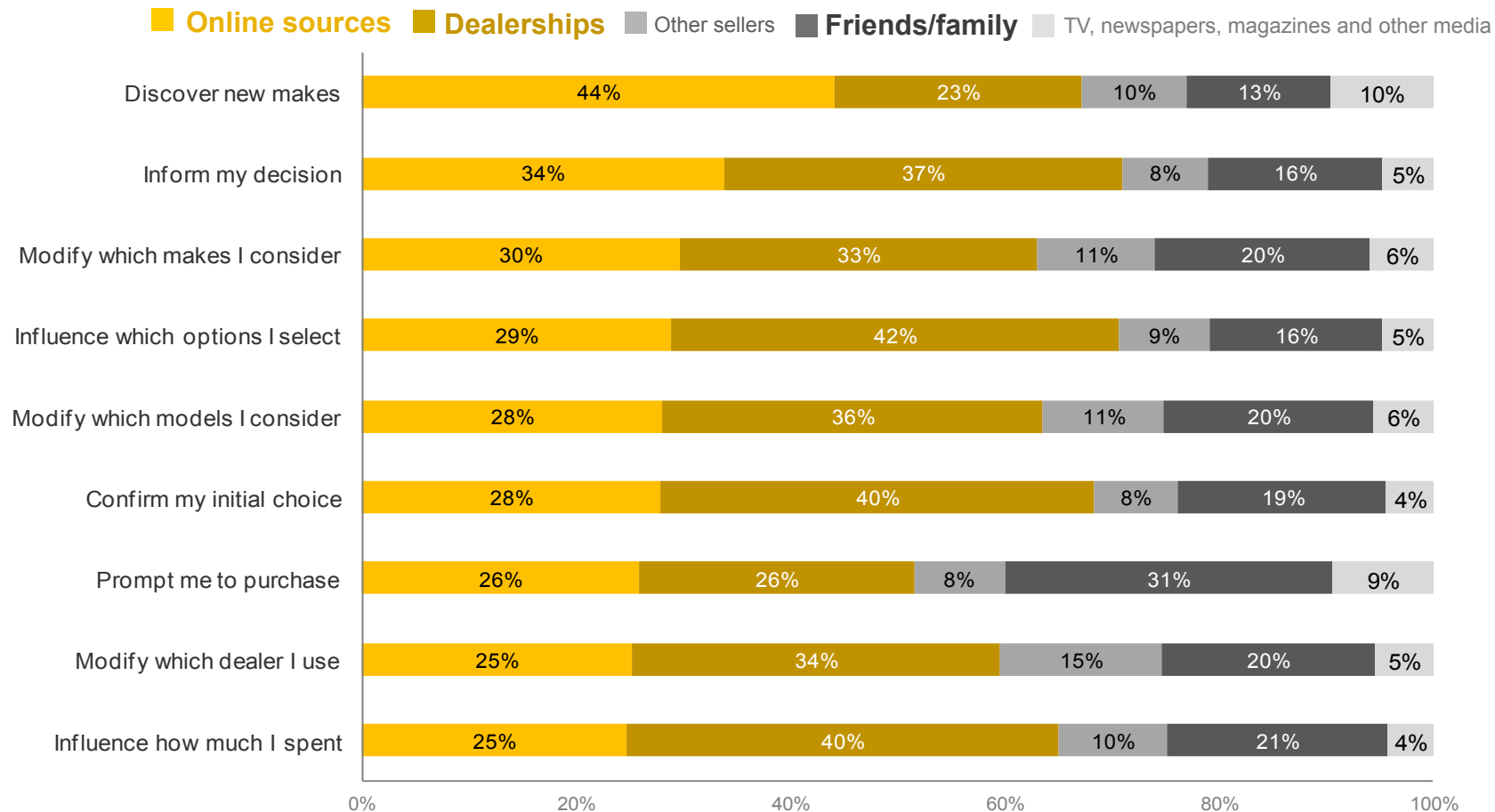
Q: Thinking about specific activities related to your final automobile purchase, what did you use the Internet to do?

Base: All new car buyers

"Arrange a lease agreement" was not asked in China

Online sources and dealerships are most influential at key milestones, followed by friends/family

Most Influential Source at Key Milestones in Purchase Process



Q: Please read the statements below and select the channel ... that was most influential for the statement.

n varies: 5985 to 9119
Base: All new car buyers who took the action
Portugal was not included

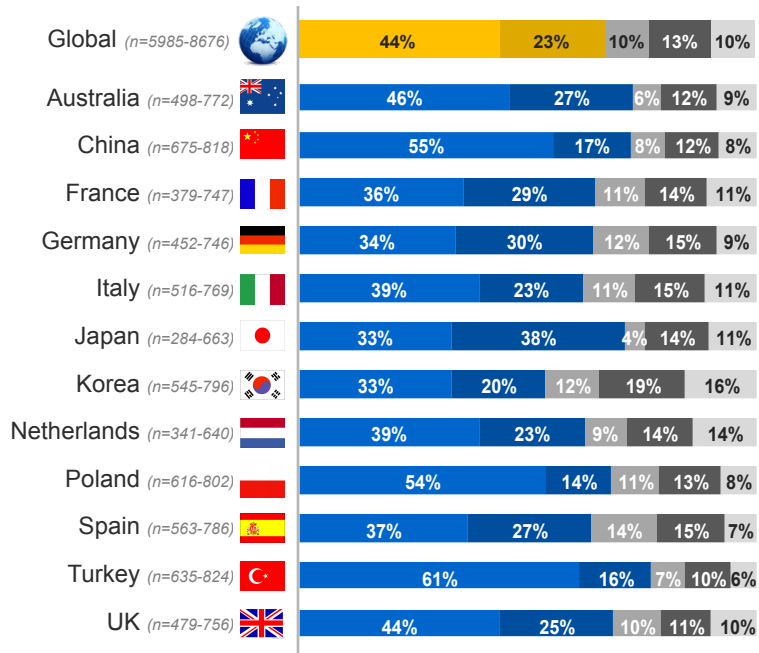
Source: The Role of the Internet in New Automobile Purchases, Global Analysis, December 2011, Netpop Research, LLC

The importance of **online sources** and **dealerships** are the two most influential sources at key milestones in the purchase process

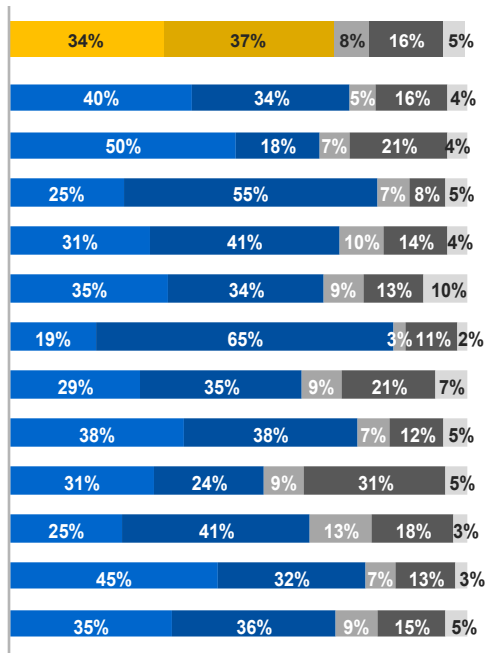
Most Influential Source at Key Milestones in Purchase Process(1)

■ **Online sources** ■ **Dealerships** ■ Other sellers ■ **Friends/family** ■ TV, newspapers, magazines and other media

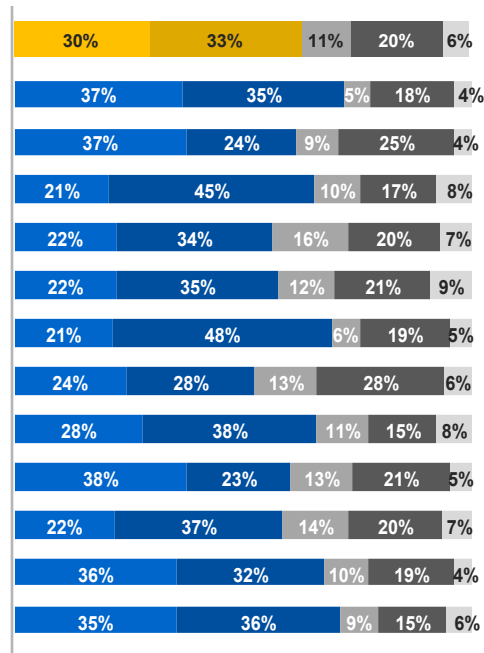
Discovered new makes of automobile



Helped me make an informed decision



Modified my choice of make



Q: Please read the statements below and select the channel ... that was most influential for the statement.

Base: All new car buyers who took the action
Portugal was not included

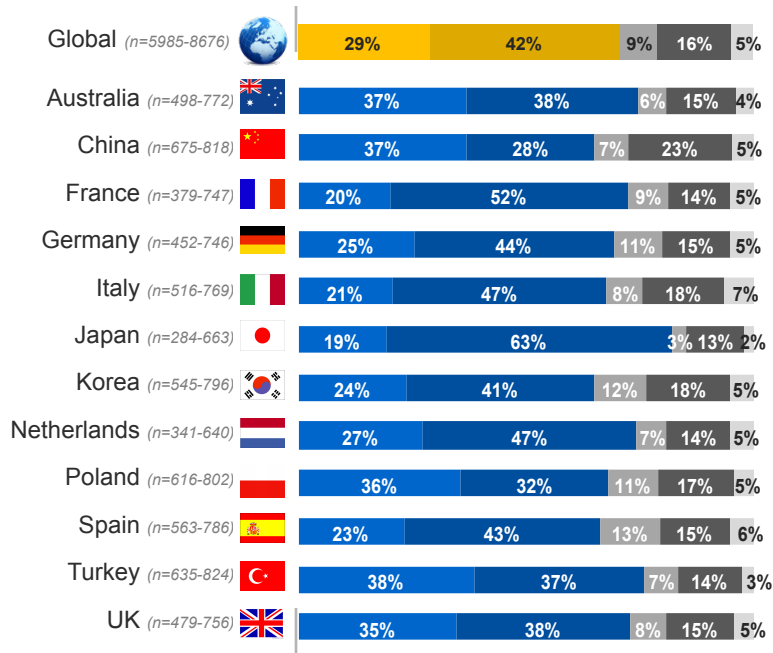
Source: The Role of the Internet in New Automobile Purchases, Global Analysis, December 2011, Netpop Research, LLC

The importance of **online sources** and **dealerships** are the two most influential sources at key milestones in the purchase process

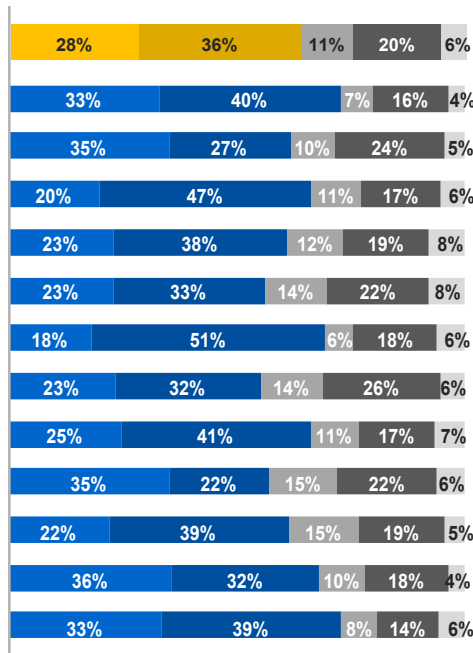
Most Influential Source at Key Milestones in Purchase Process(2)

■ **Online sources** ■ **Dealerships** ■ Other sellers ■ **Friends/family** ■ TV, newspapers, magazines and other media

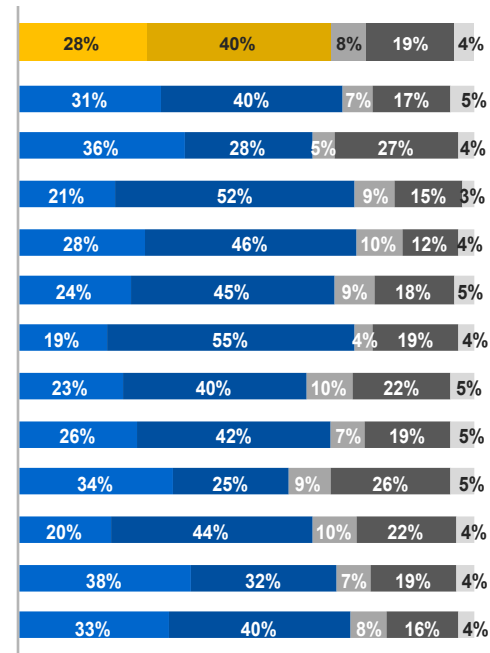
Influenced the options I selected



Modified my choice of model



Confirmed my initial choice, my idea



Q: Please read the statements below and select the channel ... that was most influential for the statement.

Base: All new car buyers who took the action

Portugal was not included

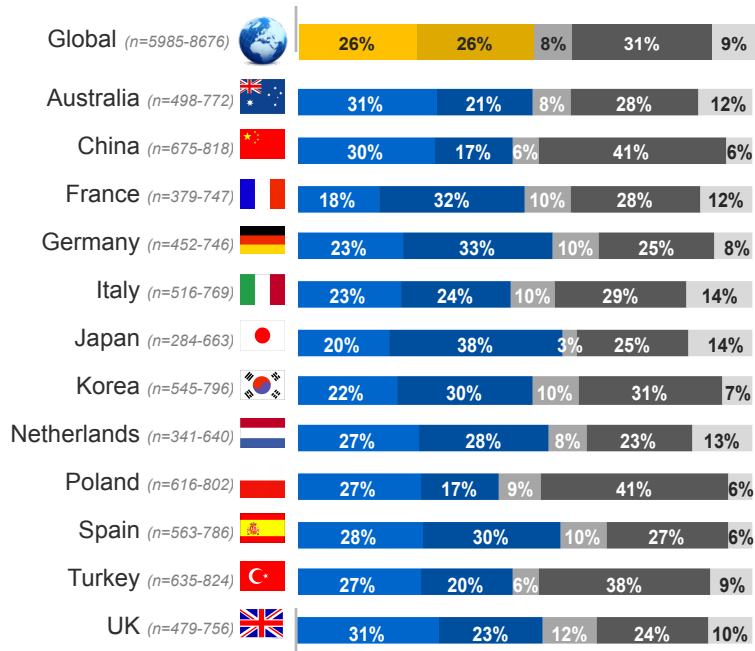
Source: The Role of the Internet in New Automobile Purchases, Global Analysis, December 2011, Netpop Research, LLC

The importance of **online sources** and **dealerships** are the two most influential sources at key milestones in the purchase process

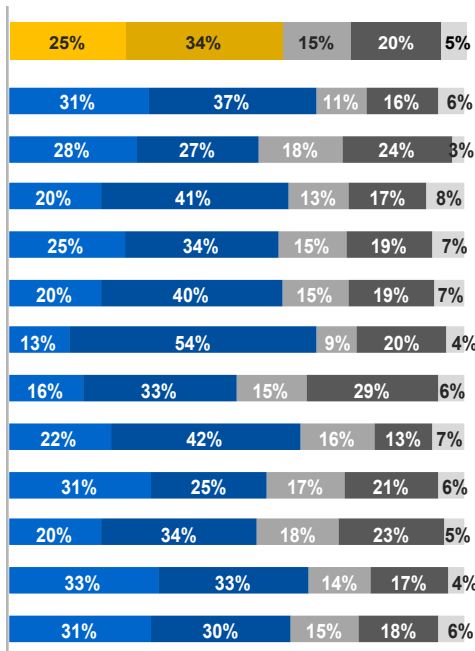
Most Influential Source at Key Milestones in Purchase Process(3)

■ **Online sources** ■ **Dealerships** ■ Other sellers ■ **Friends/family** ■ TV, newspapers, magazines and other media

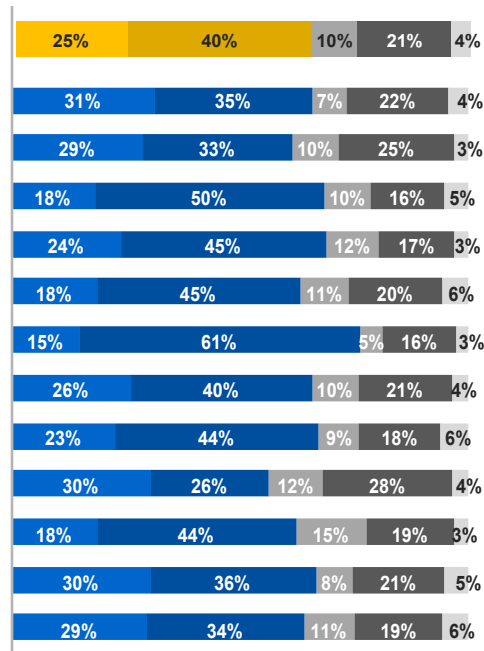
Prompted me to start thinking about an automobile purchase



Changed the dealer I had originally intended to use



Influenced the amount I planned to spend



Q: Please read the statements below and select the channel ... that was most influential for the statement.

Base: All new car buyers who took the action
Portugal was not included

Source: The Role of the Internet in New Automobile Purchases, Global Analysis, December 2011, Netpop Research, LLC

Over 9 in 10 new car buyers consider the Internet “important” for at least one activity

Percent Saying Internet is “Important*” for Activity

General research and gathering info – 84%

Comparing and refining choices – 78%

Finding out if a make or model meets my requirements – 72%

Helping **find** the **exact make and model** – 72%

Helping **find** the **exact vehicle** – 68%

Reaching my **final purchase decision** – 66%

Helping me **identify** local **sellers/dealers** – 65%

Helping me **get** the **best deal** – 54%

Helping me **arrange financing** – 44%

92%

Consider Internet
Important for at Least
One Activity

*Top 2 box score (4 , 5 on 5-pt. scale)

Q: Thinking about your use of the Internet in the research and purchase process, how would you rate its importance for each of the following aspects?

*n varies: 3045 to 7894
Base: All new car buyers who used Internet to research*

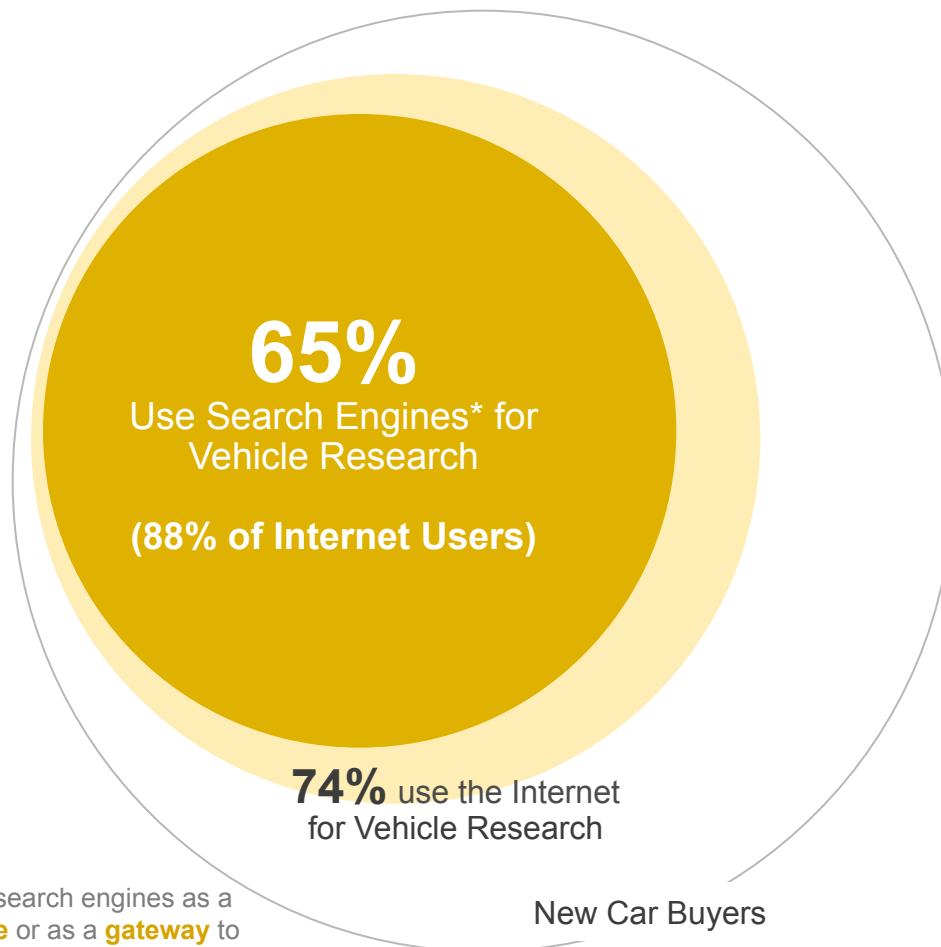
Data Library

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Summary of the Purchase Journey
Online versus Traditional and In-Person Sources
Role of the Internet at Each Phase
Role of Internet for Activities and Decision-Making

Role of Search Engines

Role of Online Video
Role of Mobile Devices in Online Auto Research
Brand Selection
Luxury versus Volume Brands
Brand Discoverers
Purchase Location and Dealer/Seller Selection
Response to Online Requests
Dealer Visits

Over 6 in 10 new car buyers use search engines during the purchase process



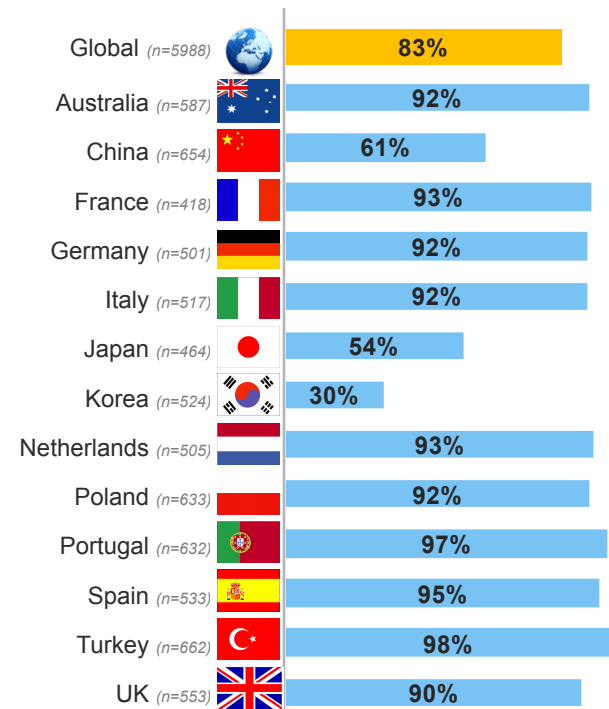
* Use search engines as a **source** or as a **gateway** to other online sources

New Car Buyers

n=11056

Base: All new car buyers

Google Use by Country

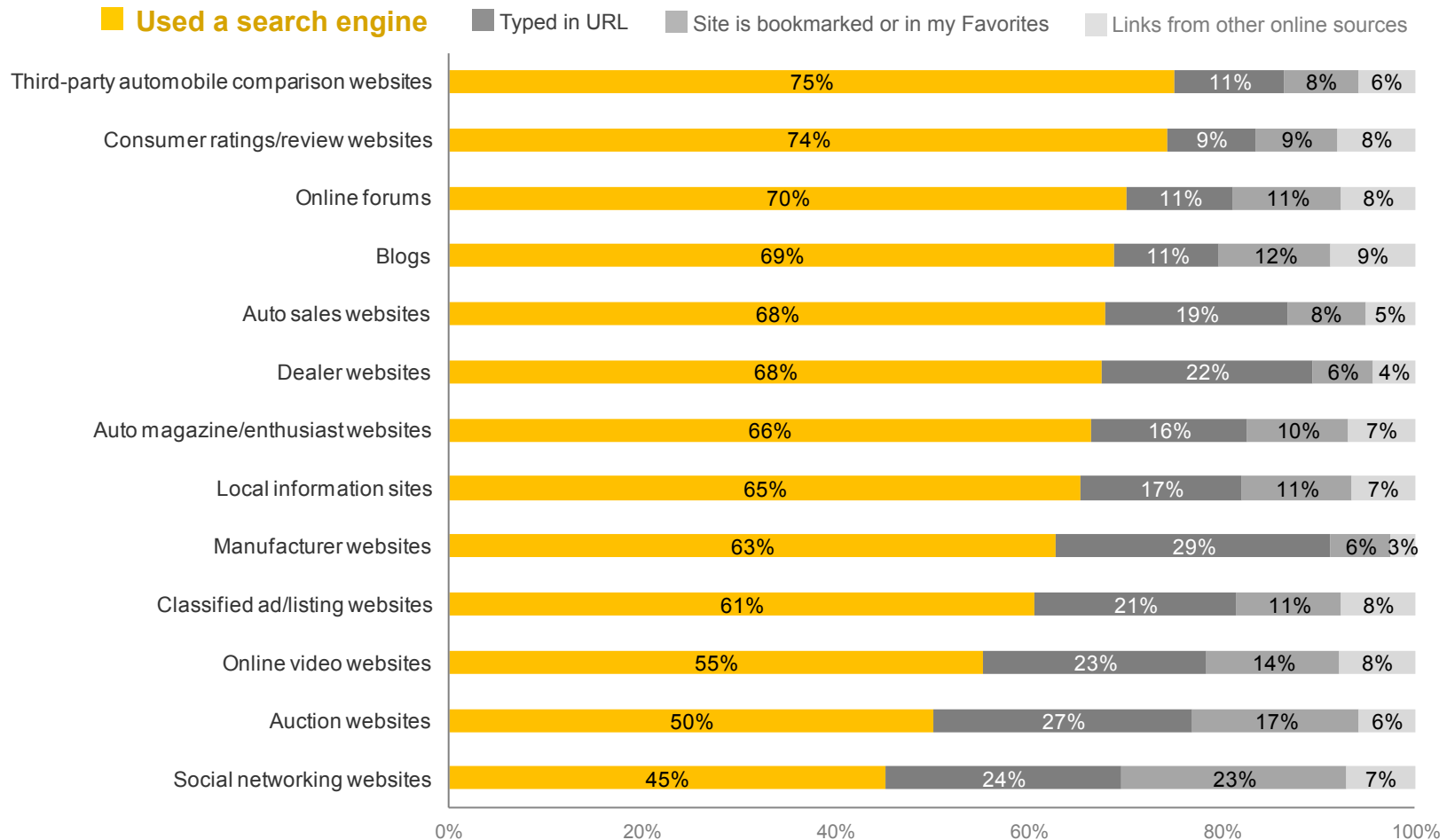


Base: All new car buyers who used search engines

Q: Which methods did you typically use to find the websites you used during your purchase process? / Which of the following search engines did you use at any point in the process?

Search engines are the primary method for accessing different types of sites for new car research

How Buyers Access Websites Used for Research



Q: Which methods did you typically use to find the websites you used during your purchase process?

n varies: 731 to 4602

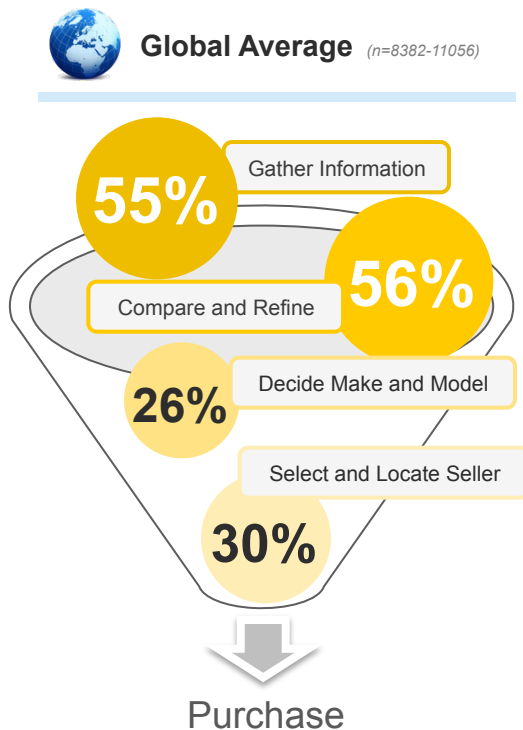
Base: All new car buyers who used the website

Auto magazine websites, auto sales websites, and 3rd-part auto comparison websites were not asked in China

Source: The Role of the Internet in New Automobile Purchases, Global Analysis, December 2011, Netpop Research, LLC

Search engines are more likely to be used in the earlier phases of research – to gather information and compare and refine options

Percent who Use Search Engine at Each Step



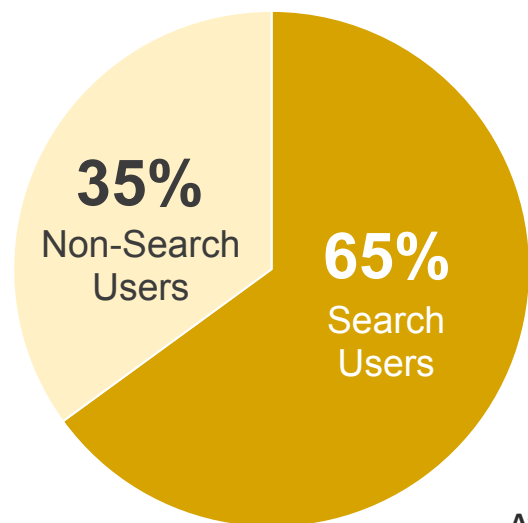
		Gather Information	Compare & Refine	Decide Make and Model	Select and locate seller
Global (n=8382-11056)		55%	56%	26%	30%
Australia (n=648-851)		59%	58%	28%	34%
China (n=673-850)		62%	61%	33%	49%
France (n=648-851)		41%	42%	18%	22%
Germany (n=610-853)		49%	51%	20%	24%
Italy (n=632-851)		51%	51%	24%	30%
Japan (n=749-850)		46%	40%	16%	15%
Korea (n=597-850)		54%	57%	24%	24%
Netherlands (n=593-850)		54%	53%	22%	26%
Poland (n=653-850)		60%	64%	35%	42%
Portugal (n=688-850)		69%	61%	25%	30%
Spain (n=600-850)		53%	54%	26%	30%
Turkey (n=618-850)		65%	69%	32%	34%
UK (n=651-850)		56%	58%	33%	34%

Q: Which of the following sources of information did you use for each of the following activities related to researching and buying your automobile? / Which methods did you typically use to find the websites you used during your purchase process?

Base: All new car buyers who used sources to research at this phase

Search engine users are serious online researchers who use more sources, do more activities online and consider more brands

Comparison of Search Engine Users and Non-Search Engine Users



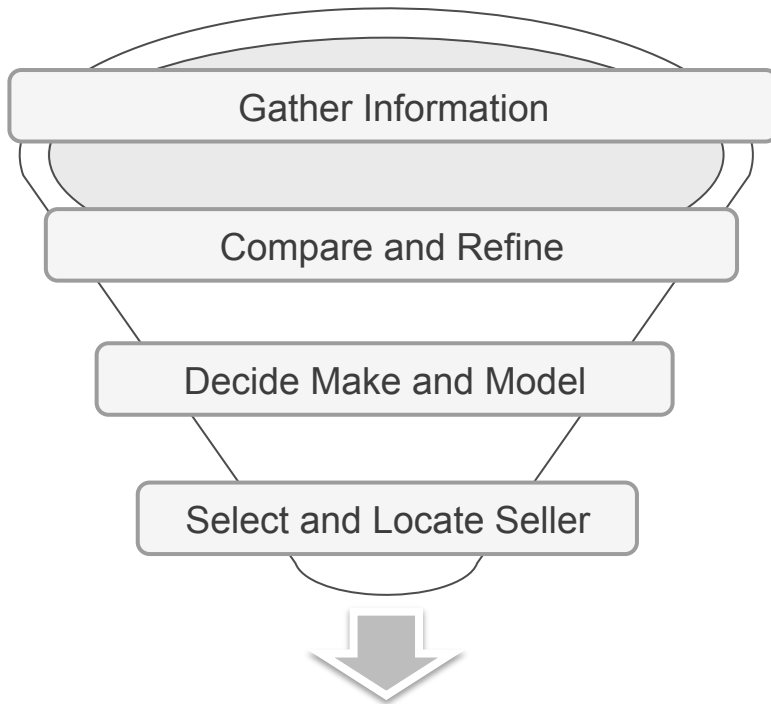
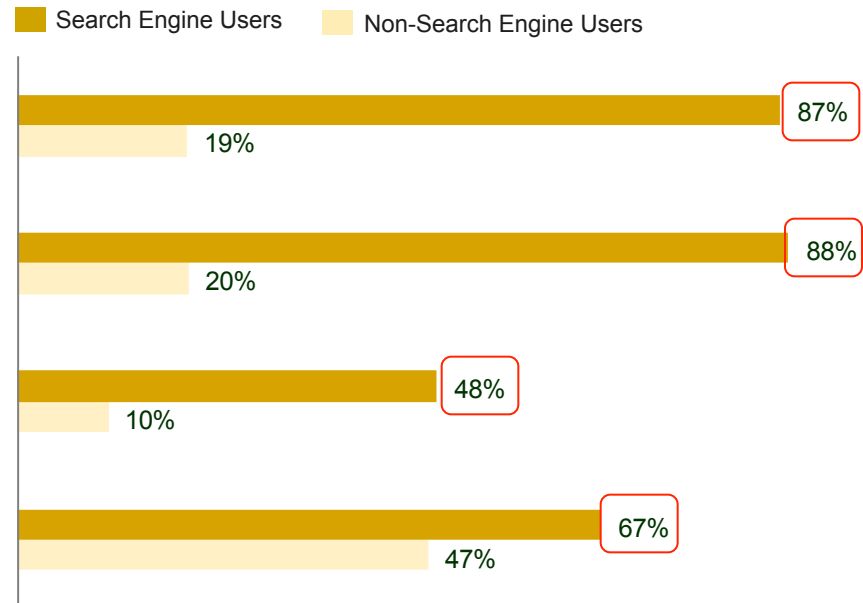
n=11056
Base: All new car buyers

	Search Engine Users (n=7183)	Non-Search Engine Users (n=3873)
Avg. Number of Online Sources	3.9	1.8
Avg. Number of Online Activities	5.4	3.2
Use Smartphone to Access Internet	49%	36%
Research Cars via Mobile Device	48%	28%
Avg. Number of Online Sources Accessed via Mobile Device	2.6	1.5
Avg. Number of Online Activities Accessed via Mobile Device	2.9	1.5
Avg. Number of Car Brands Considered	3.9	2.4
Watch auto-related online videos	75%	16%
Switch to a New Car Brand	48%	40%

 Indicates the group has a greater value than the other one, and the difference is statistically significant at a 95% confidence level

Search engine users are much more likely to use the Internet at every step of the purchase process

Percent who Use Internet at Each Step



Purchase

Indicates the group has a greater value than the other one, and the difference is statistically significant at a 95% confidence level

n varies: 5776 to 7183
Base: Search users who used sources to research at this phase
n varies: 2606 to 3873
Base: Non-search users who used sources to research at this phase

Q: Which of the following sources of information did you use for each of the following activities related to researching and buying your automobile?

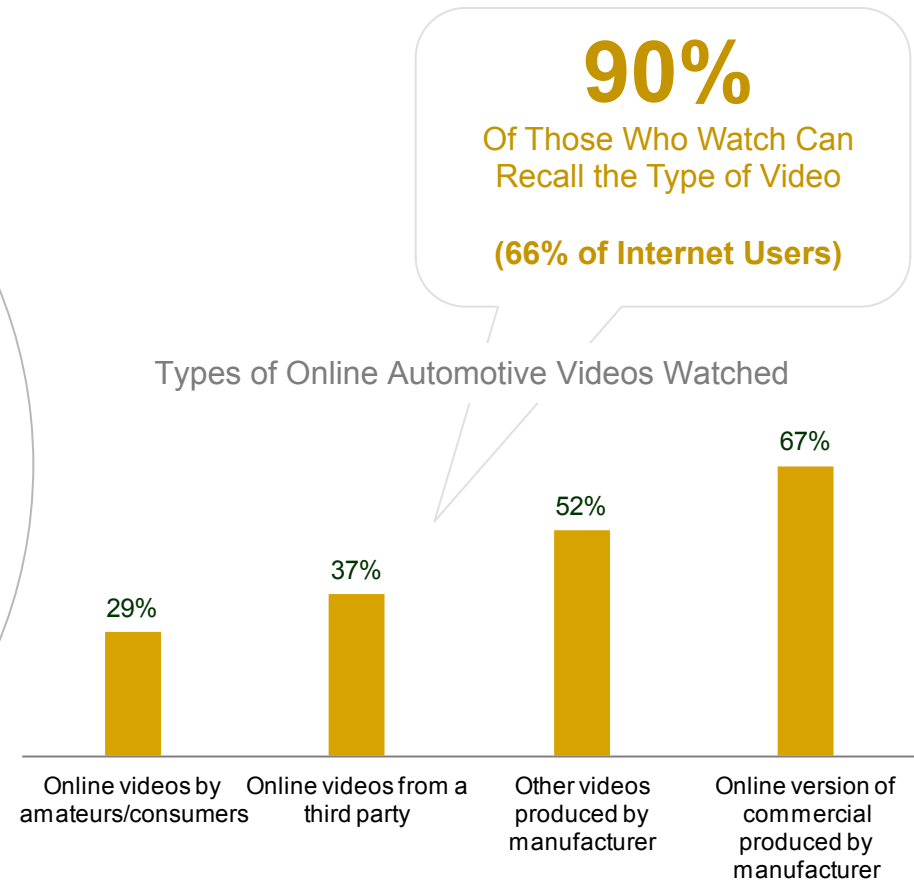
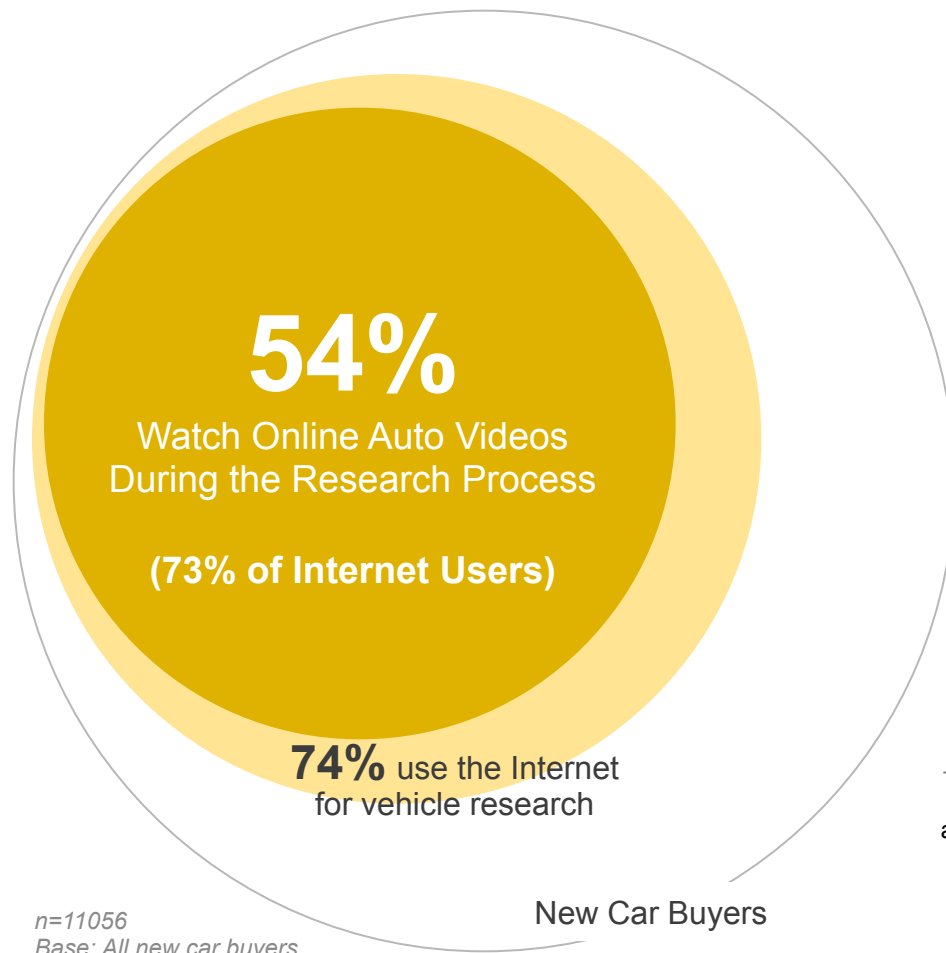
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Role of Search Engines

Role of Online Video

Role of Mobile Devices in Online Auto Research
Brand Selection
Luxury versus Volume Brands
Brand Discoverers
Purchase Location and Dealer/Seller Selection
Response to Online Requests
Dealer Visits

Over half of new car buyers watch online videos during the research process; most recall the online version of a TV commercial

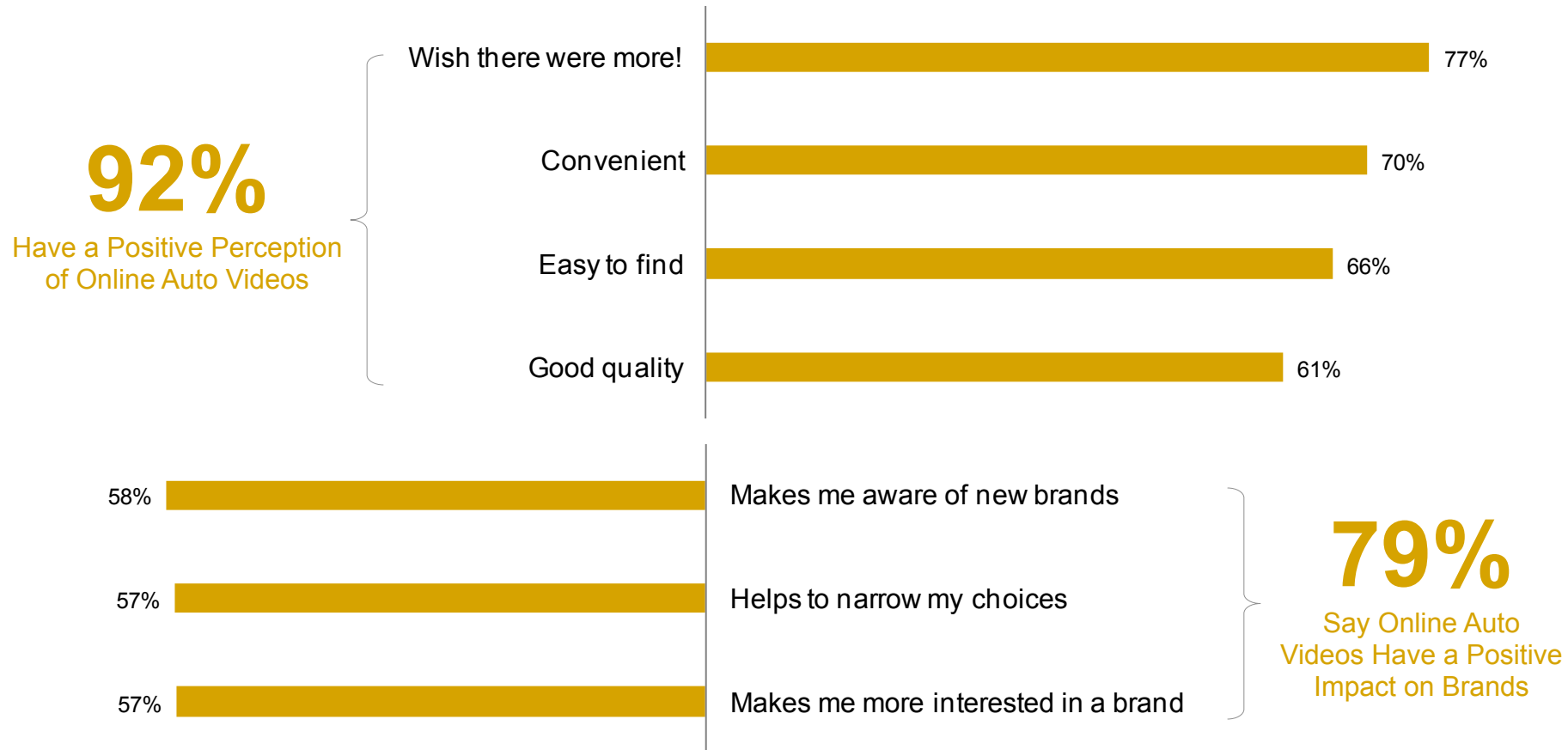


Q: Which of the following describes the types of online auto videos you watched?

n=5363
Base: All new car buyers who watched online videos for auto and can recall the type

Almost all new car buyers who watch online videos have a positive view of them, and over 3 in 4 say they have a positive impact on brands

Attitudes Toward Online Auto Videos*



*Top 2 box scores (4 or 5
on 5-pt. "agree" scale)

Q: Please read the statements below related to online auto videos and indicate to what extent you agree or disagree
with each statement.

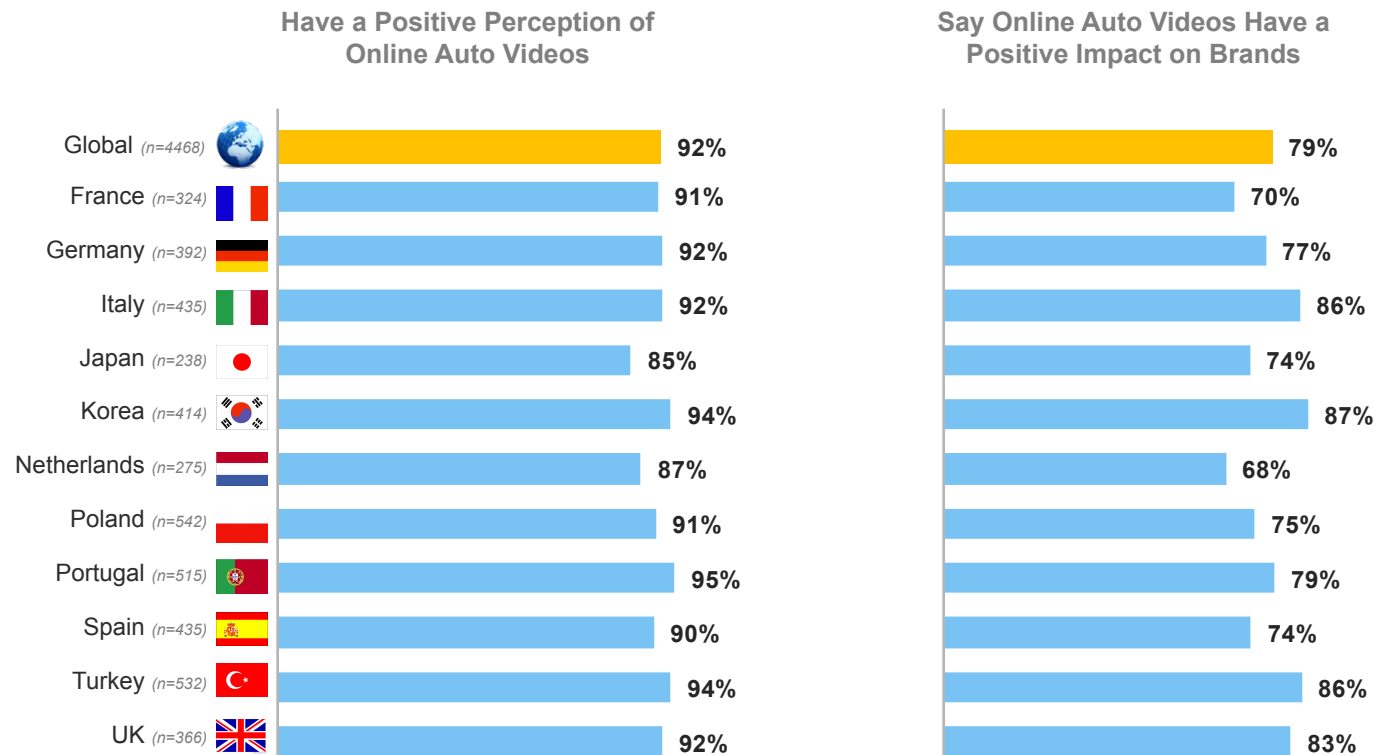
n=4468
Base: All new car buyers who watched online
videos for auto and can recall the type

This question was not asked in Australia and China

Source: The Role of the Internet in New Automobile Purchases, Global Analysis, December 2011, Netpop Research, LLC

Most new car buyers in all countries who watch online videos have a positive view of them and say they have a positive impact on brands

Attitudes Toward Online Auto Videos*



*Top 2 box scores (4 or 5 on 5-pt. "agree" scale)

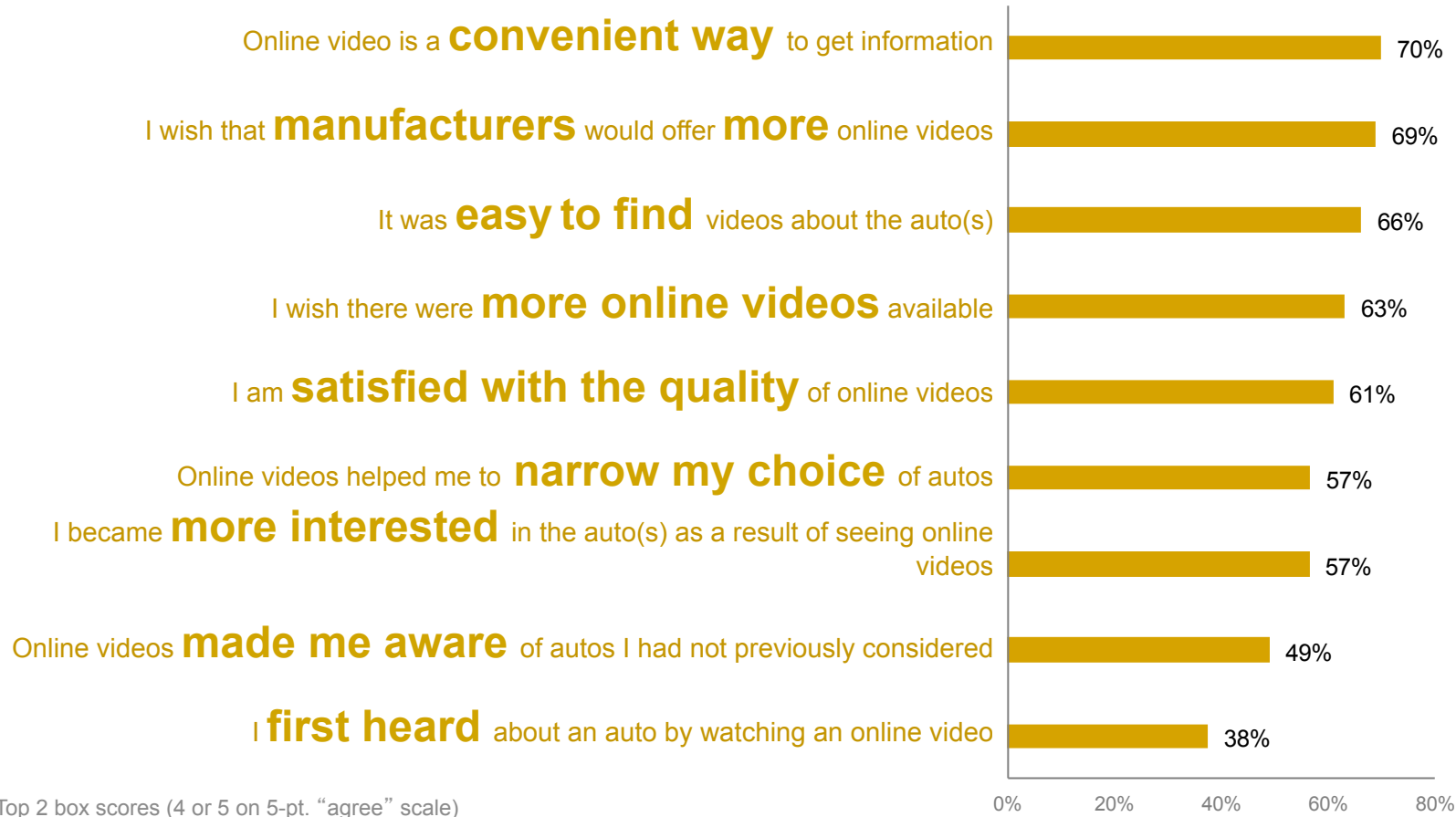
Q: Please read the statements below related to online auto videos and indicate to what extent you agree or disagree with each statement.

Base: All new car buyers who watched online videos for auto and can recall the type

This question was not asked in Australia and China

7 in 10 new car buyers who watch online videos say they are a convenient way to get information

Attitudes Toward Online Auto Videos*



n=4468

Base: All new car buyers who watched online videos for auto and can recall the type

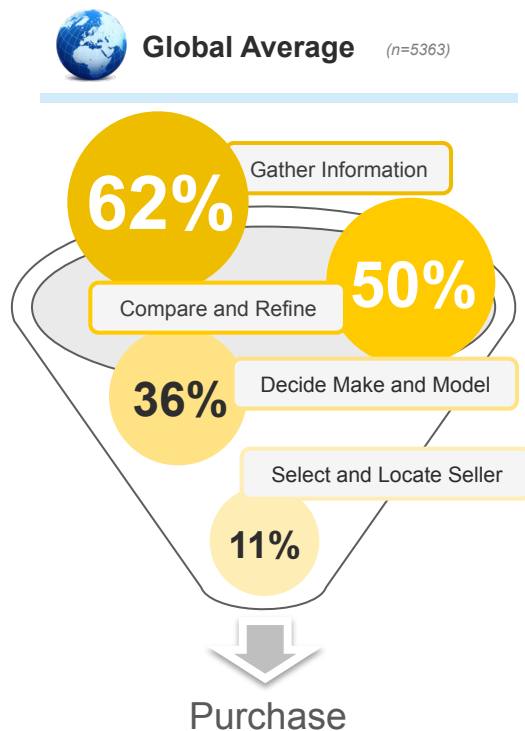
This question was not asked in Australia and China

Q: Please read the statements below related to online auto videos and indicate to what extent you agree or disagree with each statement.

Source: The Role of the Internet in New Automobile Purchases, Global Analysis, December 2011, Netpop Research, LLC

Over one-third or more use online videos at almost every phase of the purchase process

Percent who Use Online Video at Each Step



		Gather Information	Compare & Refine	Decide Make and Model	Select and locate seller
Global (n=5363)		62%	50%	36%	11%
Australia (n=366)		67%	54%	31%	13%
China (n=529)		70%	56%	36%	13%
France (n=324)		53%	47%	32%	11%
Germany (n=392)		56%	52%	36%	9%
Italy (n=435)		56%	59%	33%	11%
Japan (n=238)		61%	39%	37%	8%
Korea (n=414)		57%	56%	37%	8%
Netherlands (n=275)		63%	38%	29%	11%
Poland (n=542)		60%	51%	42%	12%
Portugal (n=515)		64%	36%	29%	7%
Spain (n=435)		59%	46%	39%	7%
Turkey (n=532)		70%	55%	45%	19%
UK (n=366)		64%	50%	37%	13%

Q: During which key activities of the purchase process did you use automobile-related online videos to help with your decisions?

Base: All new car buyers who watched online videos for auto and can recall the type

Search engines are the primary motivations for watching online automotive videos

“Triggers” for Watching Online Auto Videos

“I use **search engines** regularly to find other things so I thought I’d look for an auto video while I was there” – **46%**

“I saw a **TV ad** for an automobile and wanted to watch it again” – **33%**

“I watch other kinds of videos on **YouTube** regularly so I thought I’d look for an auto video while I was there” – **30%**

“I **inadvertently** found an auto video while reading an article online” – **27%**

“A **friend** recommended I watch an auto video” – **21%**

“I was reading an article in a **newspaper/magazine** and it listed links to videos” – **18%**

“A **dealer** recommended I watch an auto video” – **14%**

n=4834

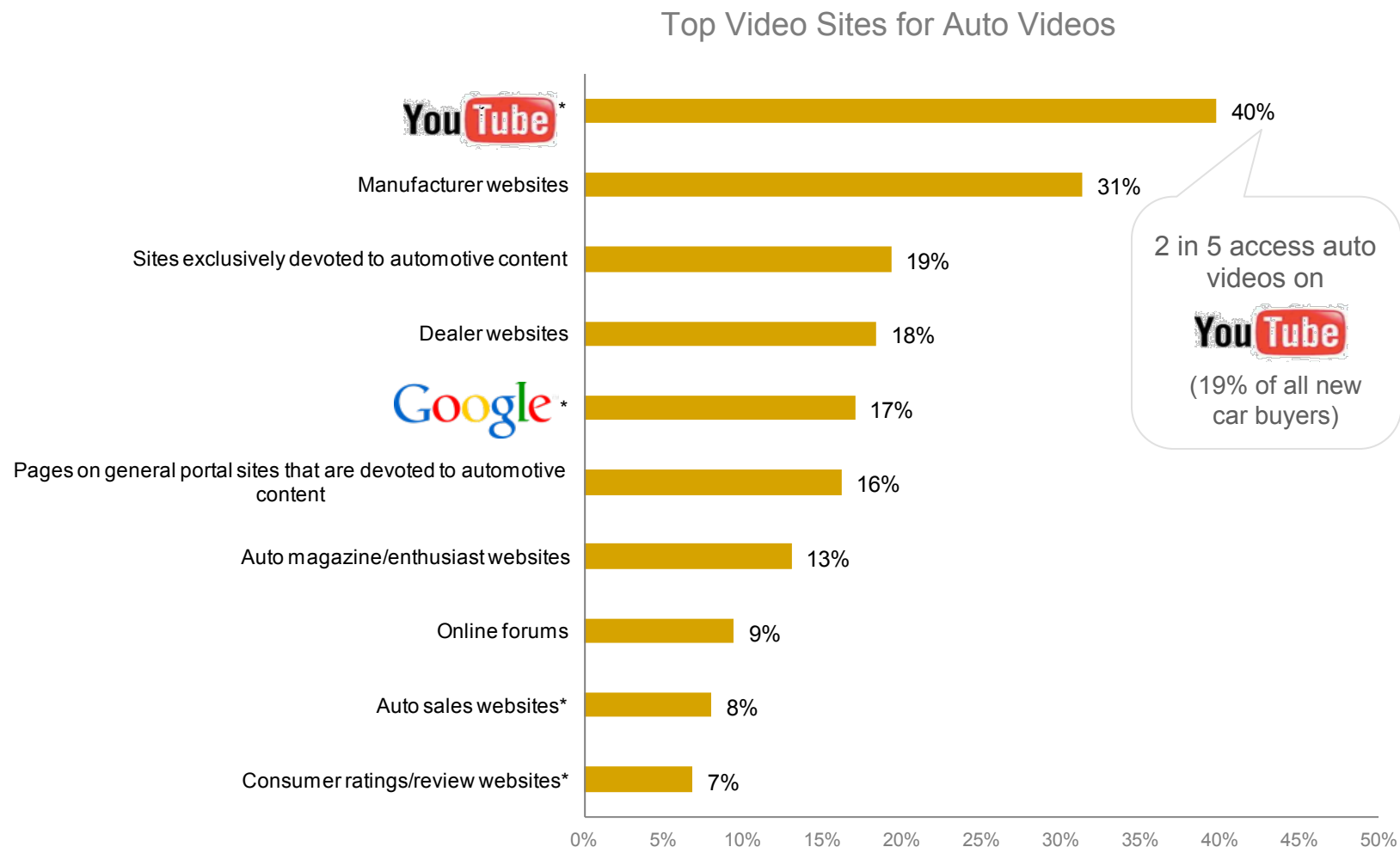
Base: All new car buyers who watched online videos for auto and can recall the type

This question was not asked in China

Q: What prompted you to watch online videos when researching or buying your automobile?

Source: The Role of the Internet in New Automobile Purchases, Global Analysis, December 2011, Netpop Research, LLC

YouTube is the top video site for auto-related videos



n=5363

Base: All new car buyers who watched online videos for auto and can recall the type

Q: Where did you access the automobile-related online videos that you watched during the purchase process?

*Sites were not asked in every country (see details in the note section)

Source: The Role of the Internet in New Automobile Purchases, Global Analysis, December 2011, Netpop Research, LLC

Car buyers who **do not watch auto videos** suggest other sources satisfy their needs

Barriers to Watching Online Auto Videos

“I **did not see a need** to watch an online video” – 42%

“I was **not interested** in watching an online video” – 41%

“I prefer to get information **in other ways**” – 27%

“It is **hard to know** which videos are **credible/trustworthy**” – 12%

“I **did not know** there were **any available**” – 11%

“Online videos are **too slow to load** and watch” – 8%

Q: You indicated that you did not watch any online auto videos. Why not? Select all that apply

n=2193
Base: All new car buyers who did not watch
online auto videos

Source: The Role of the Internet in New Automobile Purchases, Global Analysis, December 2011, Netpop Research, LLC

YouTube is the most popular video site – visited by almost all new car buyers 8 times per week on average

Frequency of Using Video Websites - YouTube

YouTube		Avg. No. per Week	EVER	SEVERAL TIMES A DAY	ONCE A DAY	SEVERAL TIMES A WEEK	ONCE A WEEK	2 TO 3 TIMES A MONTH	ONCE A MONTH OR LESS
Global (n=11056)		7.8	87%	24%	13%	22%	10%	9%	10%
Australia (n=851)		6.5	84%	18%	12%	18%	13%	10%	13%
France (n=851)		4.6	79%	11%	9%	18%	11%	14%	21%
Germany (n=853)		6.9	86%	19%	15%	20%	13%	10%	9%
Italy (n=851)		9.5	93%	32%	17%	23%	9%	6%	6%
Japan (n=850)		5.1	81%	13%	7%	22%	9%	14%	16%
Korea (n=850)		7.3	77%	19%	11%	22%	8%	8%	8%
Netherlands (n=850)		5.0	82%	12%	9%	21%	14%	12%	14%
Poland (n=850)		11.1	96%	42%	16%	23%	8%	5%	4%
Portugal (n=850)		9.9	97%	37%	14%	29%	6%	6%	5%
Spain (n=850)		8.2	94%	27%	16%	25%	10%	9%	8%
Turkey (n=850)		10.3	93%	37%	15%	21%	7%	6%	6%
UK (n=850)		7.4	86%	22%	14%	22%	10%	10%	9%

Base: All new car buyers

YouTube was not asked in China

Q: How often do you typically visit the following online video websites?

Source: The Role of the Internet in New Automobile Purchases, Global Analysis, December 2011, Netpop Research, LLC

Over half of new car buyers visit Google Video 6 times per week on average

Frequency of Using Video Websites - Google

Google		Avg. No. per Week	EVER	SEVERAL TIMES A DAY	ONCE A DAY	SEVERAL TIMES A WEEK	ONCE A WEEK	2 TO 3 TIMES A MONTH	ONCE A MONTH OR LESS
Global (n=11056)		5.9	55%	10%	7%	11%	8%	7%	10%
Germany (n=853)		4.1	52%	5%	8%	11%	9%	9%	10%
Italy (n=851)		6.9	75%	17%	12%	15%	11%	9%	10%
Japan (n=850)		5.4	17%	3%	2%	5%	3%	1%	4%
Korea (n=850)		4.6	51%	6%	8%	12%	5%	8%	11%
Netherlands (n=850)		4.4	33%	5%	3%	6%	6%	6%	8%
Portugal (n=850)		5.4	59%	11%	5%	11%	5%	10%	17%
Spain (n=850)		6.0	69%	14%	8%	15%	12%	9%	11%
Turkey (n=850)		8.0	80%	24%	11%	15%	11%	9%	10%
UK (n=850)		5.6	55%	9%	10%	12%	9%	6%	9%

Base: All new car buyers

Q: How often do you typically visit the following online video websites?

Google Video was not asked in Australia, China, France, and Poland

Source: The Role of the Internet in New Automobile Purchases, Global Analysis, December 2011, Netpop Research, LLC

Data Library

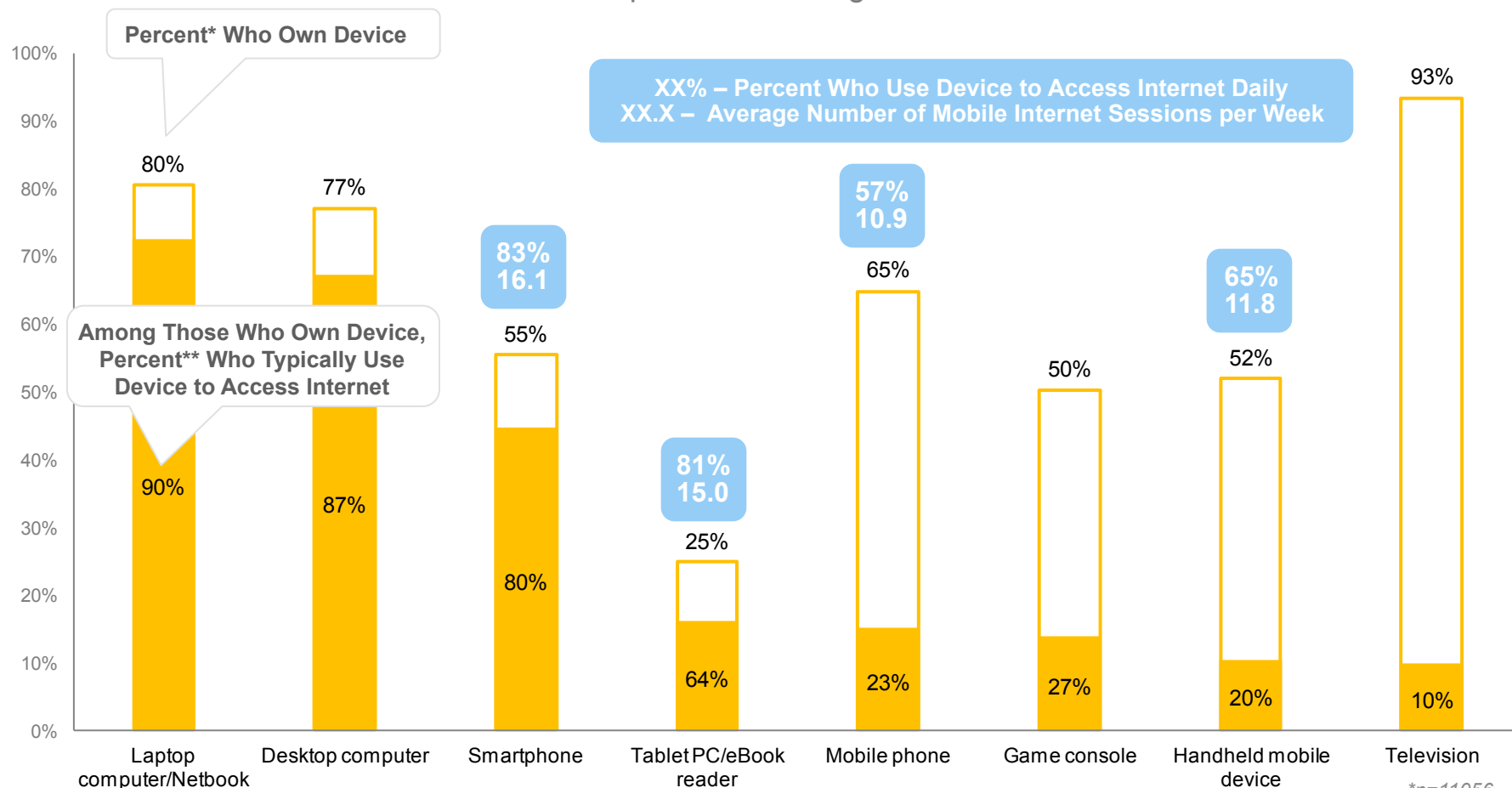
Demographics of New Car Buyers
Summary of the Purchase Journey
Online versus Traditional and In-Person Sources
Role of the Internet at Each Phase
Role of Internet for Activities and Decision-Making
Role of Search Engines
Role of Online Video

Role of Mobile Devices in Online Auto Research

Brand Selection
Luxury versus Volume Brands
Brand Discoverers
Purchase Location and Dealer/Seller Selection
Response to Online Requests
Dealer Visits

4 in 5 smartphone owners use the device to access the Internet – 83% do so on a daily basis, approx. 2 times a day

Ownership and Use of Digital Devices



*n=11056

Base: All new car buyers

**n varies: 2752 to 10326

Base: All new car buyers who own the device

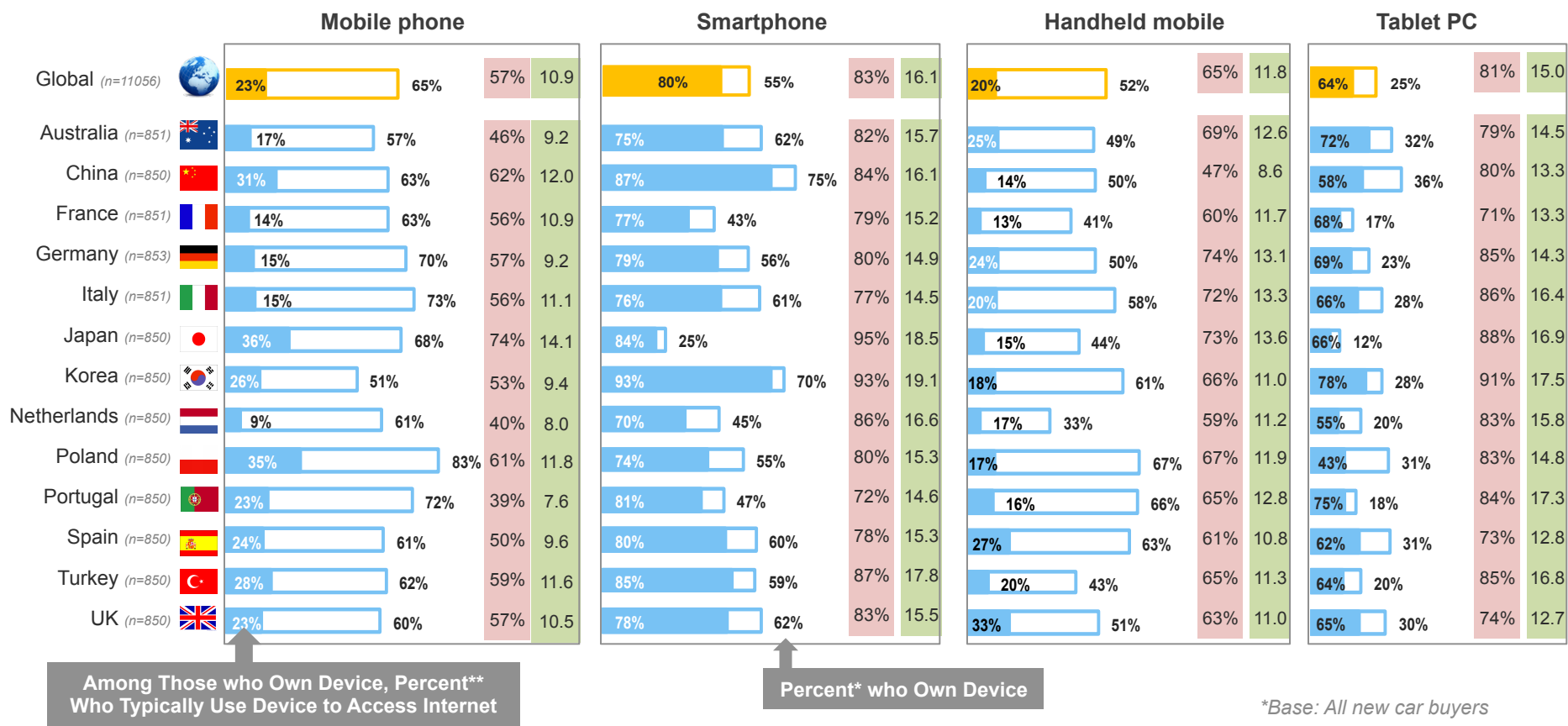
Q: Which kinds of devices do you own? / Which devices do you typically use to go online/access the Internet? / How frequently do you access the Internet from the following mobile devices?

Source: The Role of the Internet in New Automobile Purchases, Global Analysis, December 2011, Netpop Research, LLC

New car buyers in China and Korea are most likely to own a smartphone and to use them to access the Internet

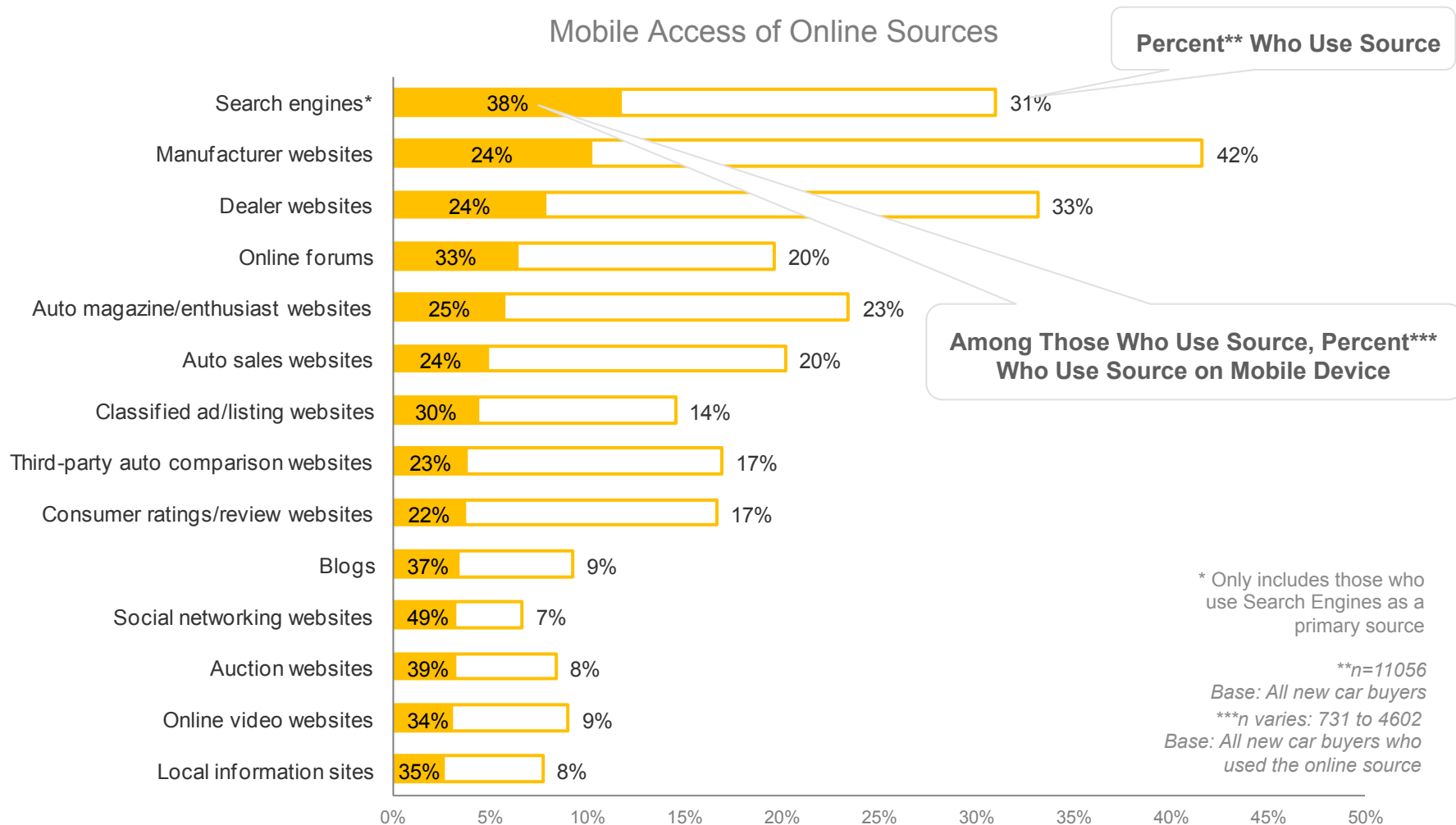
Ownership and Use of Digital Devices

Percent Who Use Device to Access Internet Daily Average Number of Mobile Internet Sessions per Week



Q: Which kinds of devices do you own? / Which devices do you typically use to go online/access the Internet? / How frequently do you access the Internet from the following mobile devices?

Over a third of those who use **search engines** as a primary source access it via a **mobile device**



* Only includes those who use Search Engines as a primary source

**n=11056

Base: All new car buyers

***n varies: 731 to 4602

Base: All new car buyers who used the online source

Q: Did you access any of these online sources from your mobile device at any stage when researching and purchasing your automobile?

Auto sales websites, 3rd-part auto comparison websites and consumer ratings/review websites were not asked in China

Source: The Role of the Internet in New Automobile Purchases, Global Analysis, December 2011, Netpop Research, LLC

Approximately one-third of those who use search engines as a primary source access it via a mobile device

Mobile Access of Online Sources

		Search engines*	Manufacturer websites	Dealer websites	Online forums	Auto magazine websites	Auto sales websites	Classified ad/listing websites	3rd-party auto comparison websites	Consumer ratings/review websites	Blogs	Social networking websites	Auction websites	Online video websites	Local information sites
Global (n=731-4602)		38%	24%	24%	33%	25%	24%	30%	23%	22%	37%	49%	39%	34%	35%
AU (n=48-422)		34%	21%	25%	37%	24%	22%	25%	25%	21%	41%	52%	33%	43%	36%
CN (n=44-410)		54%	30%	30%	45%	33%	N/A	29%	N/A	N/A	47%	51%	36%^	30%	35%
FR (n=14-336)		32%	18%	20%	20%	16%	14%	24%	19%	20%	35%^	36%^	14%^	25%^	53%^
DE (n=45-329)		32%	22%	23%	34%	28%	28%	30%	23%	30%	33%^	43%^	37%	38%	37%
IT (n=54-323)		42%	32%	28%	33%	30%	31%	39%	28%	35%	35%	52%	45%	41%	42%
JP (n=10-371)		37%	29%	24%	60%^	34%	33%^	40%^	26%	22%	45%^	59%^	61%^	63%^	47%^
KR (n=26-310)		52%	27%	30%	43%	26%	30%	19%^	29%	34%	46%	58%	50%^	35%	38%^
NL (n=17-336)		17%	11%	12%	12%	13%	9%	11%^	8%	9%	12%^	47%^	33%	24%^	12%^
PL (n=89-403)		35%	27%	26%	32%	27%	28%	32%	26%	24%	38%	38%	38%	35%	33%
PT (n=23-489)		26%	19%	13%	18%	13%	16%	18%	0%	11%	17%	47%	23%	25%	22%^
ES (n=37-322)		44%	27%	28%	31%	27%	22%	33%	23%	22%	33%	49%	59%^	39%	31%
TR (n=67-418)		41%	33%	31%	33%	22%	29%	38%	23%	13%	30%	51%	37%	21%	30%
UK (n=69-355)		33%	23%	22%	34%	27%	34%	38%	20%	27%	41%	54%	45%	46%	38%

* Only includes those who use Search Engines as a primary source

Q: Did you access any of these online sources from your mobile device at any stage when researching and purchasing your automobile?

Base: All new car buyers who used the online source

Auto sales websites, 3rd-part auto comparison websites and consumer ratings/review websites were not asked in China

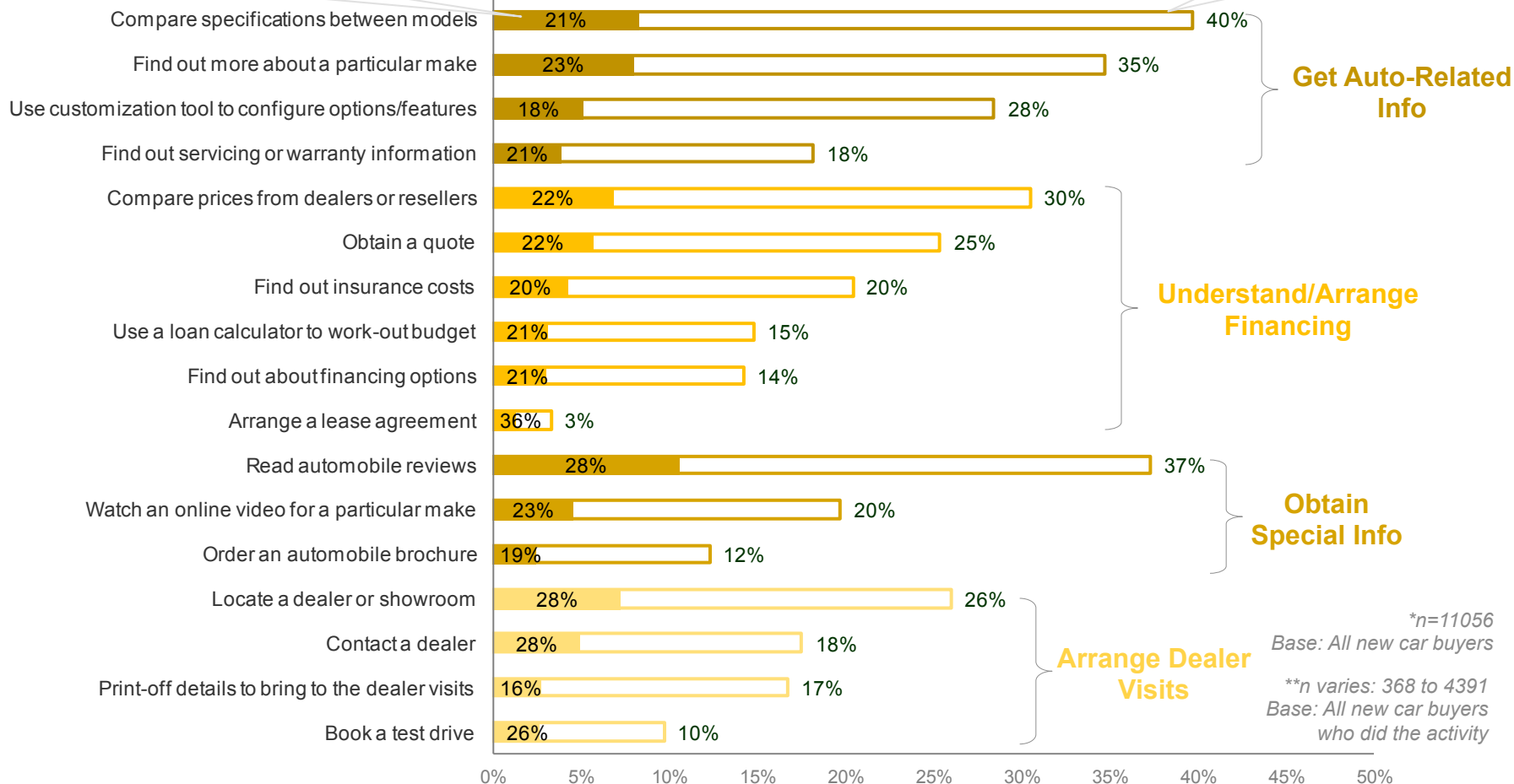
^CAUTION: Sample size is small (n<50) ^^CAUTION: Sample size is extremely small (n<20)

The research activities most likely to be done on a mobile device include locating a dealer and reading reviews

Among Those Who Do Activity, Percent** Who Do Activity on Mobile Device

Mobile Access for Research Activities

Percent* Who Do Activity



*n=11056

Base: All new car buyers

**n varies: 368 to 4391

Base: All new car buyers who did the activity

Q: Which of these activities, if any, did you use the Internet on your mobile device to do?

"Arrange a lease agreement" was not asked in China

Over a third of buyers in Korea do multiple research activities on a mobile device

Mobile Access for Research Activities(1 of 2)

		Compare specifications between models	Find out more about a particular make	Use customization tool to configure options/features	Find out servicing or warranty information	Compare prices from dealers or resellers	Obtain a quote	Find out insurance costs	Use a loan calculator to work-out budget	Find out about financing options	Arrange a lease agreement
Global (n=368-4391)		21%	23%	18%	21%	22%	22%	20%	21%	21%	36%
AU (n=46-371)		14%	17%	16%	13%	18%	26%	14%	22%	20%	35%^
CN (n=114-465)		30%	34%	26%	28%	31%	25%	26%	26%	27%	N/A
FR (n=10-281)		12%	16%	10%	6%	15%	7%	15%	10%	14%^	30%^^
DE (n=33-317)		16%	16%	12%	18%	24%	21%	17%	25%	16%	36%^
IT (n=36-317)		26%	29%	18%	25%	29%	25%	21%	36%	25%	44%^
JP (n=37-238)		24%	20%	26%	38%^	25%	17%	4%	6%	9%	14%^
KR (n=22-347)		36%	36%	20%	30%	31%	20%	29%	21%	21%	41%^
NL (n=14-303)		6%	11%	7%	9%	10%	9%	4%	24%^	12%	29%^^
PL (n=69-444)		23%	25%	23%	24%	25%	27%	27%	22%	17%	52%
PT (n=17-438)		10%	13%	9%	9%	11%	12%	18%	5%	5%	18%^^
ES (n=27-283)		22%	29%	13%	37%	20%	16%	19%	23%	29%	33%^
TR (n=17-495)		25%	29%	22%	19%	20%	30%	19%	17%	20%	24%^^
UK (n=41-295)		21%	21%	21%	30%	26%	30%	27%	30%	25%	34%^

“Arrange a lease agreement” was not asked in China
Base: All new car buyers who did the activity

Q: Which of these activities, if any, did you use the Internet on your mobile device to do?

^CAUTION: Sample size is small (n<50) ^^CAUTION: Sample size is extremely small (n<20)

Almost half of buyers in Korea read automobile reviews on a mobile device

Mobile Access for Research Activities(2 of 2)

		Read automobile reviews	Watch an online video for a particular make	Order an automobile brochure	Locate a dealer or showroom	Contact a dealer	Print-off details to bring to the dealer visits	Book a test drive
Global (n=368-4391)		28%	23%	19%	28%	28%	16%	26%
AU (n=46-371)		22%	16%	14%	23%	26%	12%	27%
CN (n=114-465)		46%	25%	21%	36%	30%	20%	32%
FR (n=10-281)		25%	11%	18%	26%	17%	11%	24%^
DE (n=33-317)		23%	21%	18%	27%	20%	11%	24%
IT (n=36-317)		33%	27%	23%	35%	30%	19%	30%
JP (n=37-238)		27%	29%	33%	28%	37%	26%^	35%^
KR (n=22-347)		48%	34%	21%^	33%	33%	24%	37%^
NL (n=14-303)		12%	17%	7%	11%	16%	9%	11%
PL (n=69-444)		27%	33%	30%	31%	31%	22%	31%
PT (n=17-438)		14%	15%	9%	19%	22%	8%	15%
ES (n=27-283)		26%	24%	30%	32%	43%	15%	24%
TR (n=17-495)		27%	24%	13%	30%	29%	13%	16%
UK (n=41-295)		28%	24%	21%	29%	31%	23%	31%

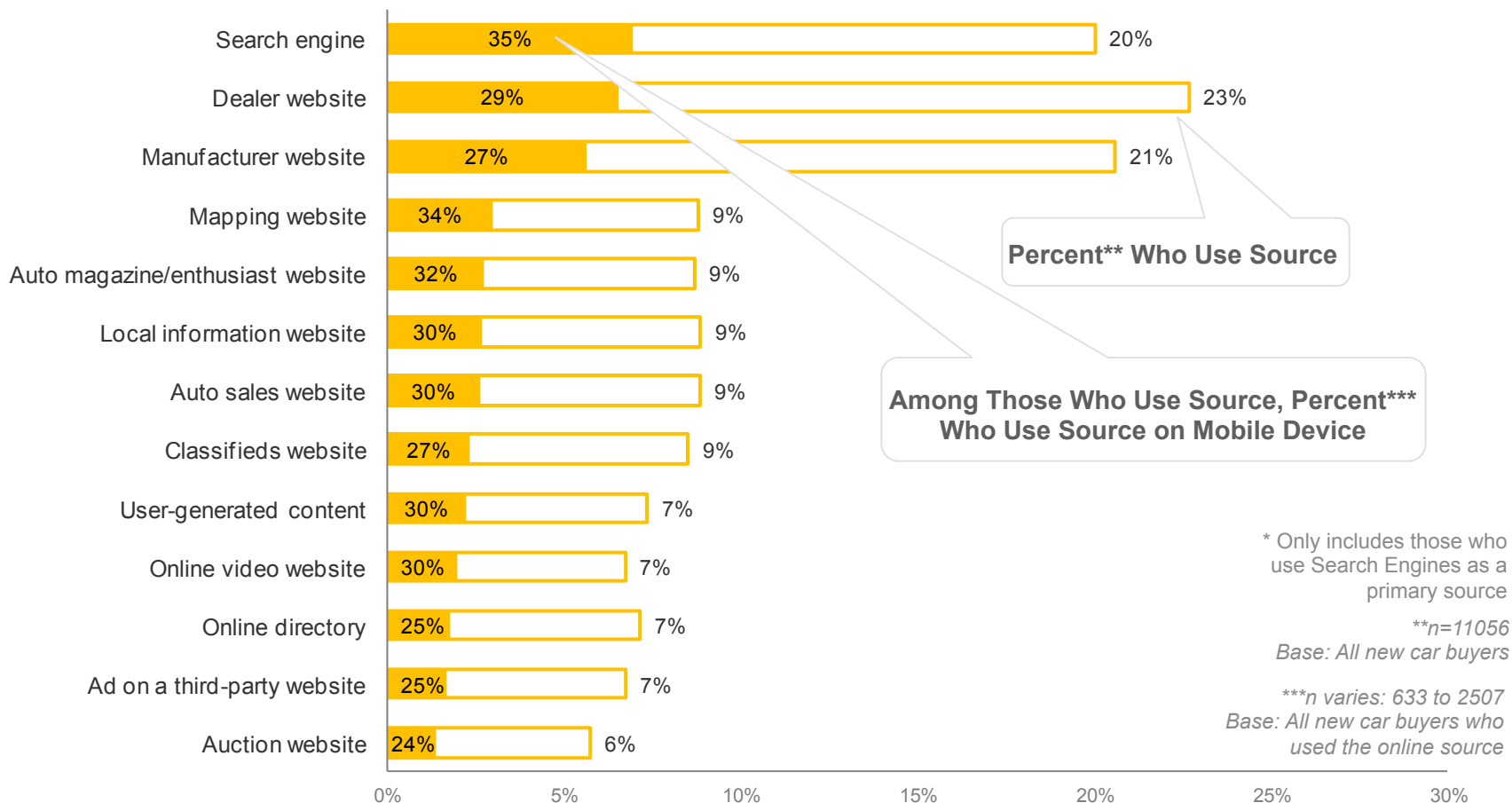
Base: All new car buyers who did the activity

Q: Which of these activities, if any, did you use the Internet on your mobile device to do?

^^CAUTION: Sample size is small (n<50) ^^CAUTION: Sample size is extremely small (n<20)

Over one-third of those who use search engines to select and locate sellers/dealers access search via a mobile device

Mobile Access of Online Sources to Select and Locate Sellers/Dealers



* Only includes those who use Search Engines as a primary source

**n=11056

Base: All new car buyers

***n varies: 633 to 2507

Base: All new car buyers who used the online source

Q: Did you use your mobile device to access any of these online sources to help you find the seller of your new automobile?

Ad on a third-party website, user-generated content, online directory, auto magazine website, auction website, and online video website were not asked in Australia
Auto sales websites were not asked in China

Source: The Role of the Internet in New Automobile Purchases, Global Analysis, December 2011, Netpop Research, LLC

Over 2 in 5 buyers in Korea who use search engines to select and locate sellers/dealers access search engines via a mobile device

Mobile Access of Online Sources to Select and Locate Sellers/Dealers

		Search engine	Dealer website	Manufacturer website	Mapping website	Auto magazine website	Local information website	Auto sales website	Classified websites	User-generated content	Online video website	Online directory	Ad on a 3rd-party website	Auction website
Global (n=633-2507)		35%	29%	27%	34%	32%	30%	30%	27%	30%	30%	25%	25%	24%
AU (n=73-258)		32%	29%	23%	44%	N/A	33%	26%	31%	N/A	N/A	N/A	N/A	N/A
CN (n=69-289)		50%	35%	33%	34%	42%	36%	N/A	29%	33%	27%	22%	31%	9%
FR (n=22-182)		30%	31%	23%	20%^	25%^	20%^	19%^	18%^	27%^	23%^	29%	15%^	24%^
DE (n=31-154)		29%	27%	26%	43%^	26%	36%	22%	35%	29%^	38%	18%^	29%^	23%^
IT (n=56-189)		38%	30%	26%	28%	29%	29%	36%	19%	32%	33%	25%	22%	21%
JP (n=8-131)		26%	33%	27%	41%^	52%^	46%^	29%^	42%^	69%^	31%^	56%^	75%^	56%^
KR (n=43-152)		43%	39%	33%	41%	37%	31%	36%	23%	38%	44%	29%^	24%	19%^
NL (n=50-212)		16%	16%	13%	9%	16%	15%	9%	5%	12%	10%	11%	4%	14%
PL (n=98-263)		35%	30%	29%	38%	30%	40%	36%	33%	28%	29%	33%	27%	36%
PT (n=22-185)		21%	18%	19%	26%	17%^	11%^	12%	18%^	13%^	7%^	9%^	15%^	9%^
ES (n=60-182)		34%	30%	31%	29%	27%	29%	25%	24%	29%	32%	19%	16%	22%
TR (n=55-264)		40%	35%	37%	45%	30%	26%	39%	35%	30%	24%	38%	33%	29%
UK (n=63-229)		34%	25%	31%	32%	37%	31%	43%	33%	36%	41%	28%	27%	29%

* Only includes those who use Search Engines as a primary source

Q: Did you use your mobile device to access any of these online sources to help you find the seller of your new automobile?

^CAUTION: Sample size is small (n<50) ^^CAUTION: Sample size is extremely small (n<20)

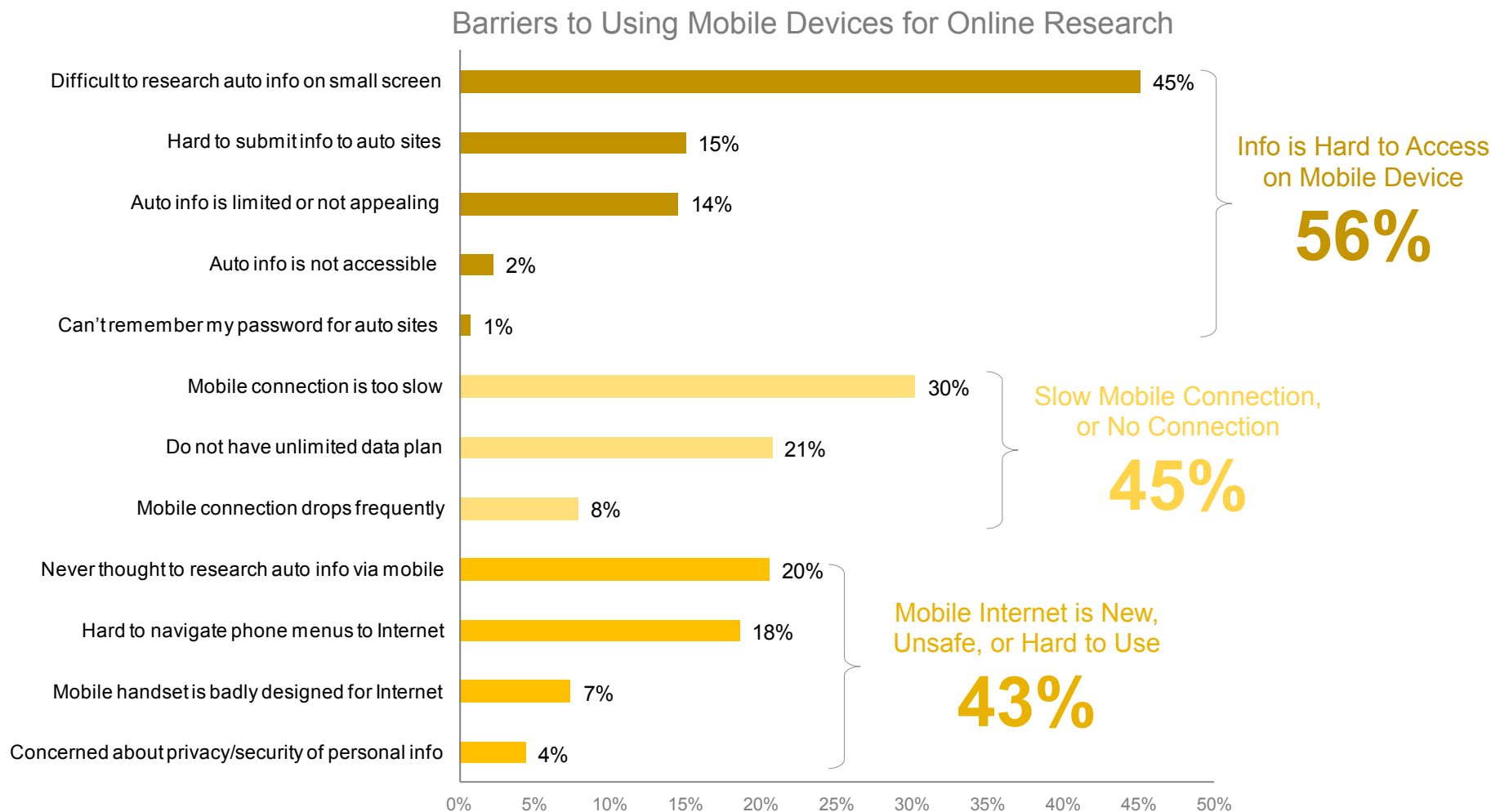
Ad on a third-party website, user-generated content, online directory, auto magazine website, auction website, and online video website were not asked in Australia

Auto sales websites were not asked in China

Base: All new car buyers who used the online source

Source: The Role of the Internet in New Automobile Purchases, Global Analysis, December 2011, Netpop Research, LLC

The primary barrier to using a mobile device for auto research is the difficulty of doing research on a small screen

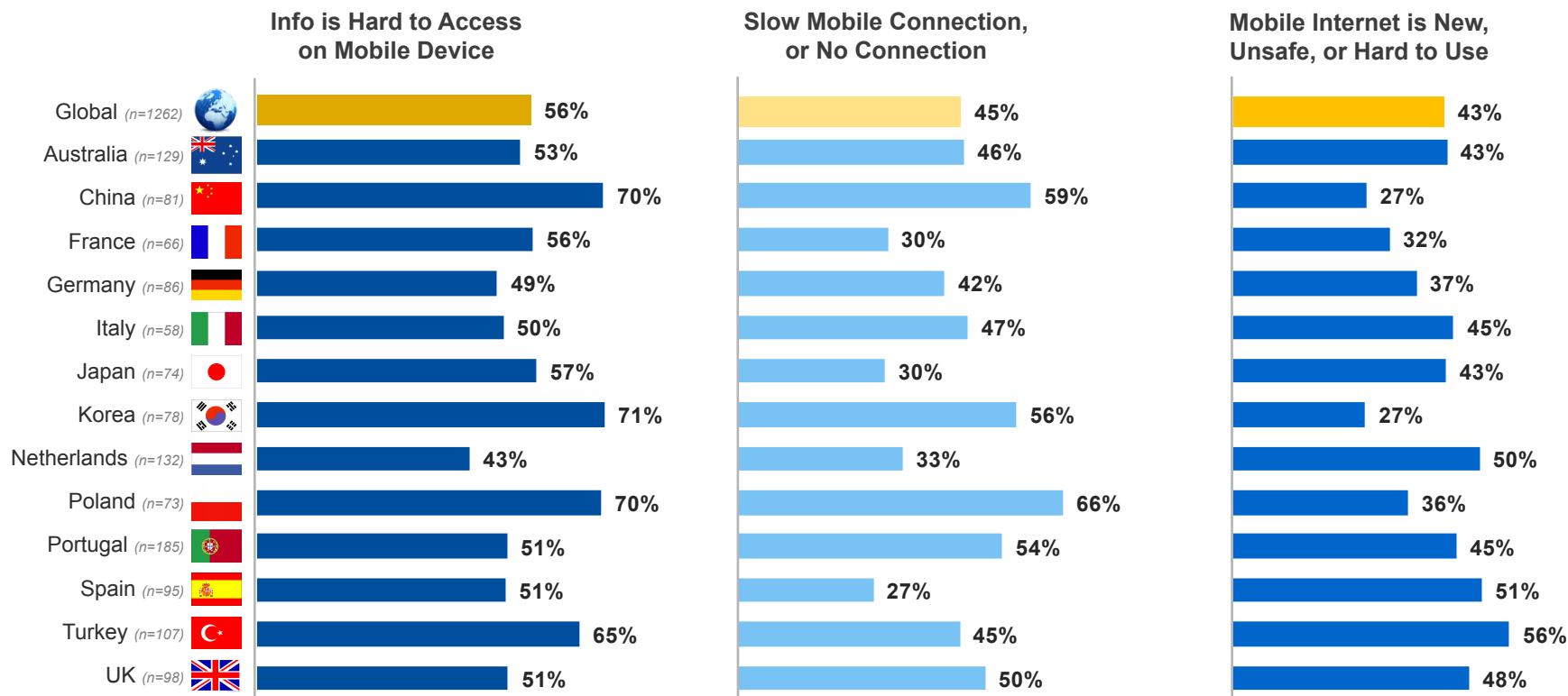


Q: Why didn't you use your mobile device for these purposes?

n=1262
Base: All new car buyers who didn't use their mobile device for online sources or activities

In most countries, the primary barrier to researching auto info on a mobile device is the difficulty of doing research on a small screen

Barriers to Using Mobile Devices for Online Research



Q: Why didn't you use your mobile device for these purposes?

Base: All new car buyers who didn't use their mobile device for online sources or activities

Data Library

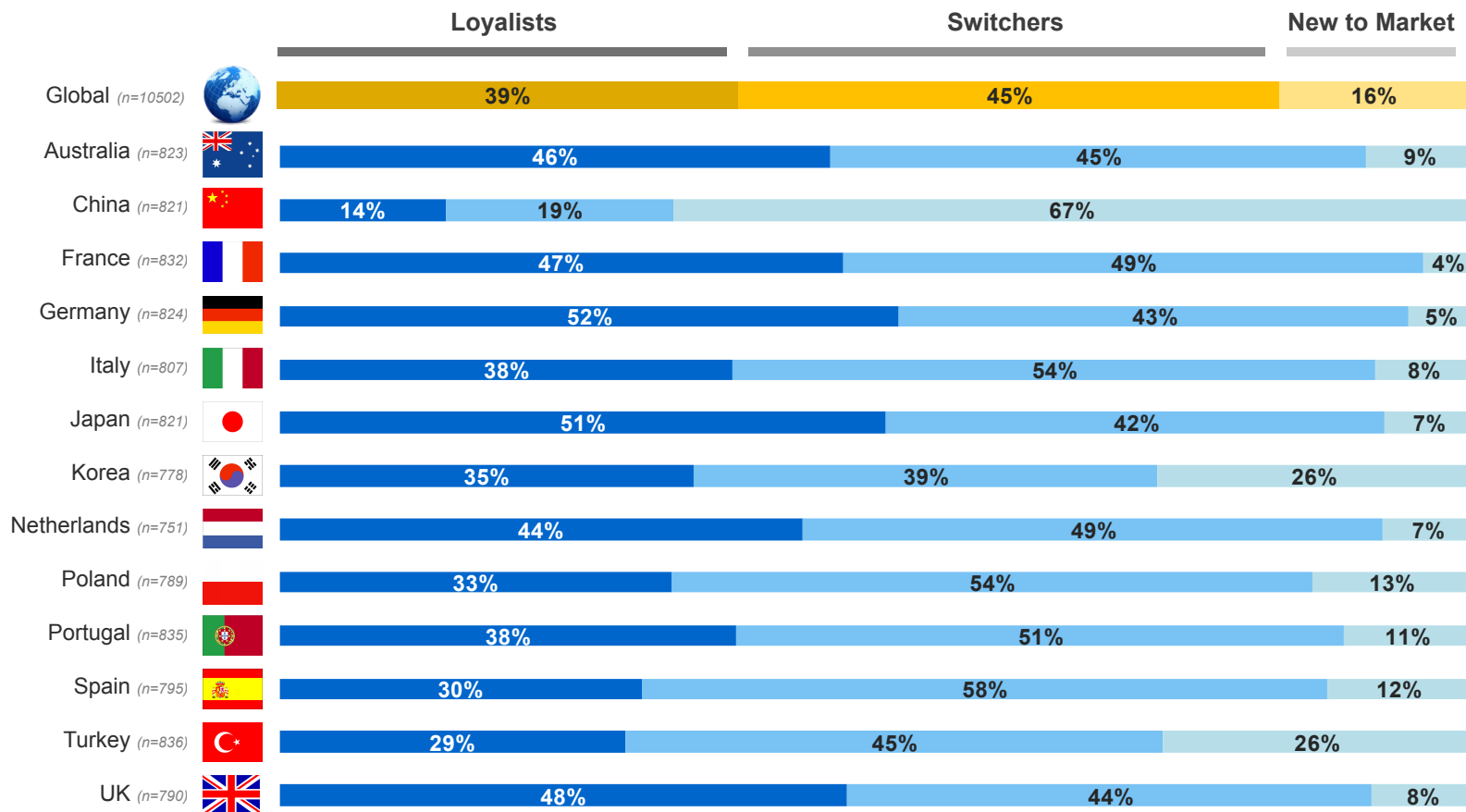
Demographics of New Car Buyers
Summary of the Purchase Journey
Online versus Traditional and In-Person Sources
Role of the Internet at Each Phase
Role of Internet for Activities and Decision-Making
Role of Search Engines
Role of Online Video
Role of Mobile Devices in Online Auto Research

Brand Selection

Luxury versus Volume Brands
Brand Discoverers
Purchase Location and Dealer/Seller Selection
Response to Online Requests
Dealer Visits

China has the highest percent of buyers who are new to market

First-Time Buyers, Brand Loyalists and Brand Switchers

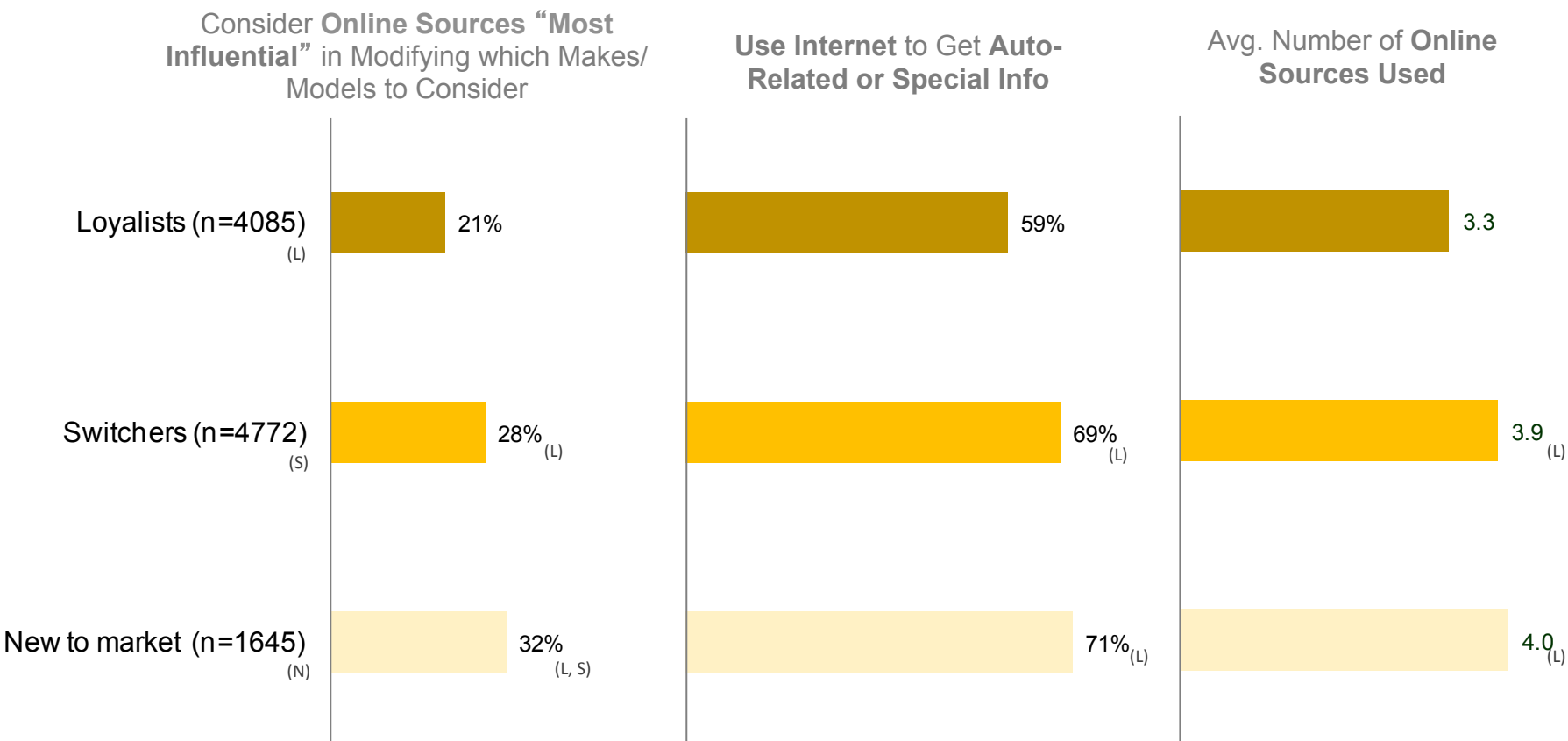


Q: What was the make/brand of your previous vehicle? / What was the make/brand of the vehicle you purchased?

Base: All new car buyers

First-Time Buyers do more auto research online

Loyalists, Switchers and First-Time Buyers



Q: Please read the statements below and select the channel ... that was most influential for the statement. / Thinking about specific activities related to your final automobile purchase, what did you use the Internet to do? / Which online sources of information did you use at any stage in researching and buying your automobile?

Initial in parentheses indicates its group has a smaller value than the group where it appears, and the difference is statistically significant at the 95% confidence level

Data Library

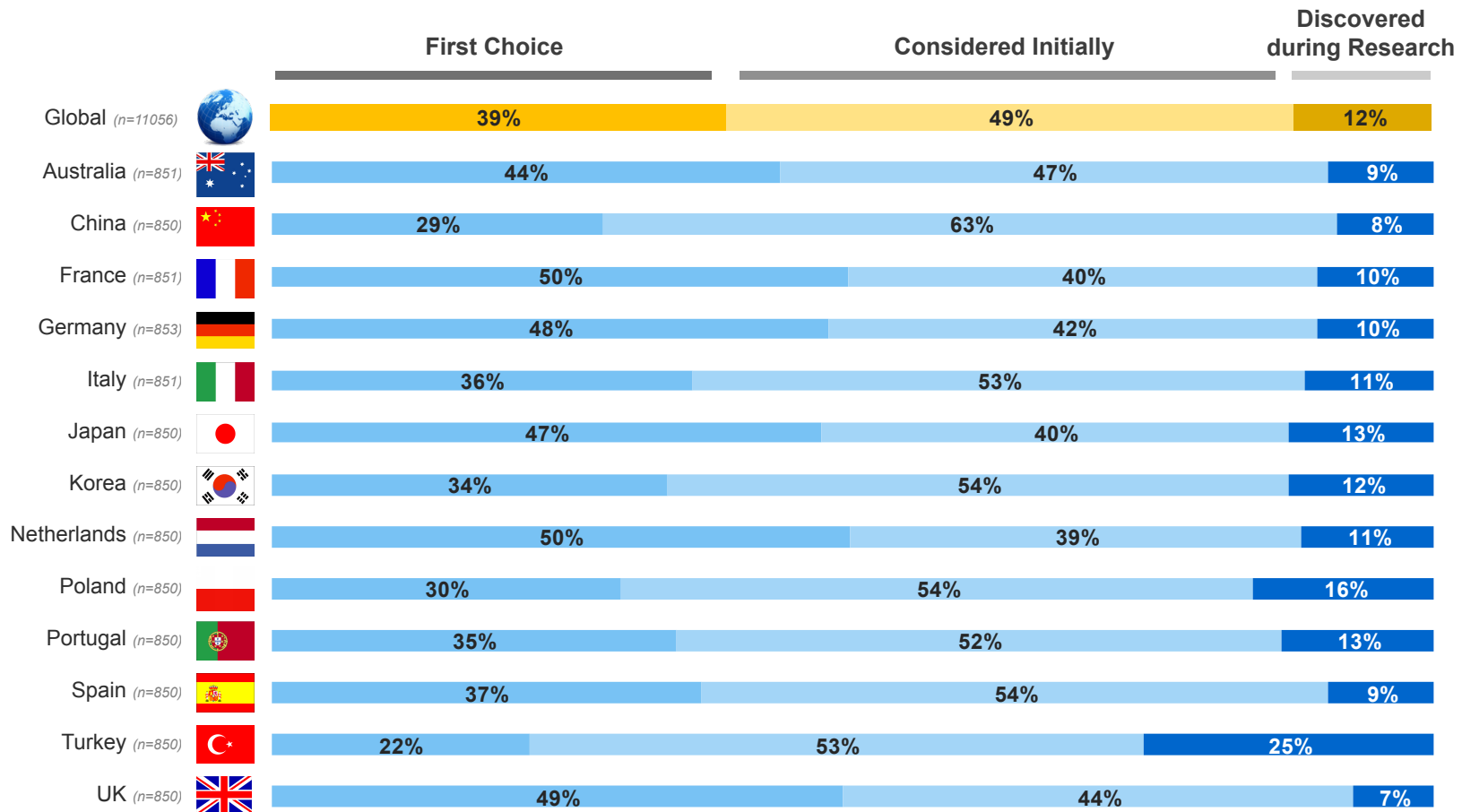
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Role of Online Video
Role of Mobile Devices in Online Auto Research
Brand Selection
Luxury versus Volume Brands

Brand Discoverers

Purchase Location and Dealer/Seller Selection
Response to Online Requests
Dealer Visits

Buyers in Turkey are most likely to ultimately purchase a brand they **discovered** during research

Classification of Purchased Brand



Q: Which of these statements best describes the automobile you purchased?

Base: All new car buyers

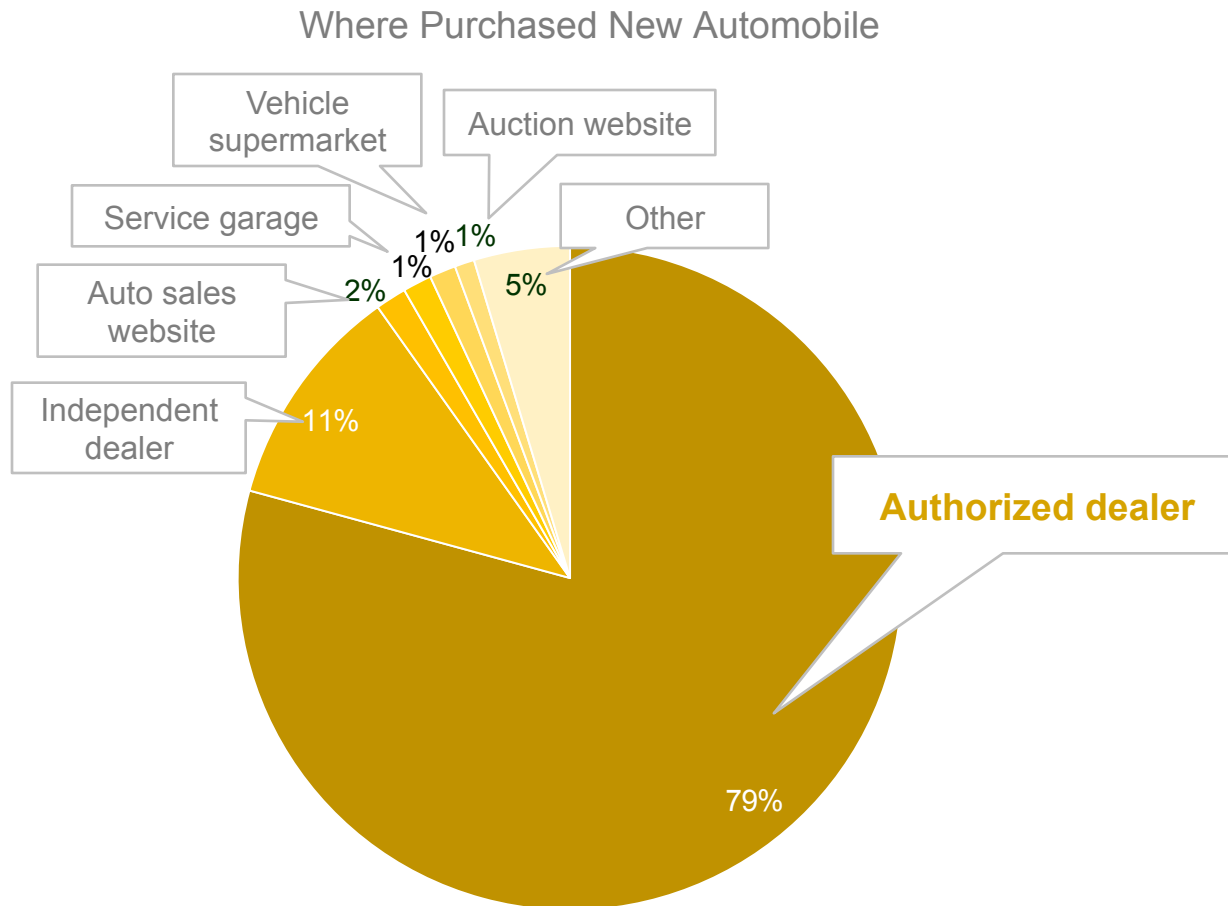
Data Library

Demographics of New Car Buyers
Summary of the Purchase Journey
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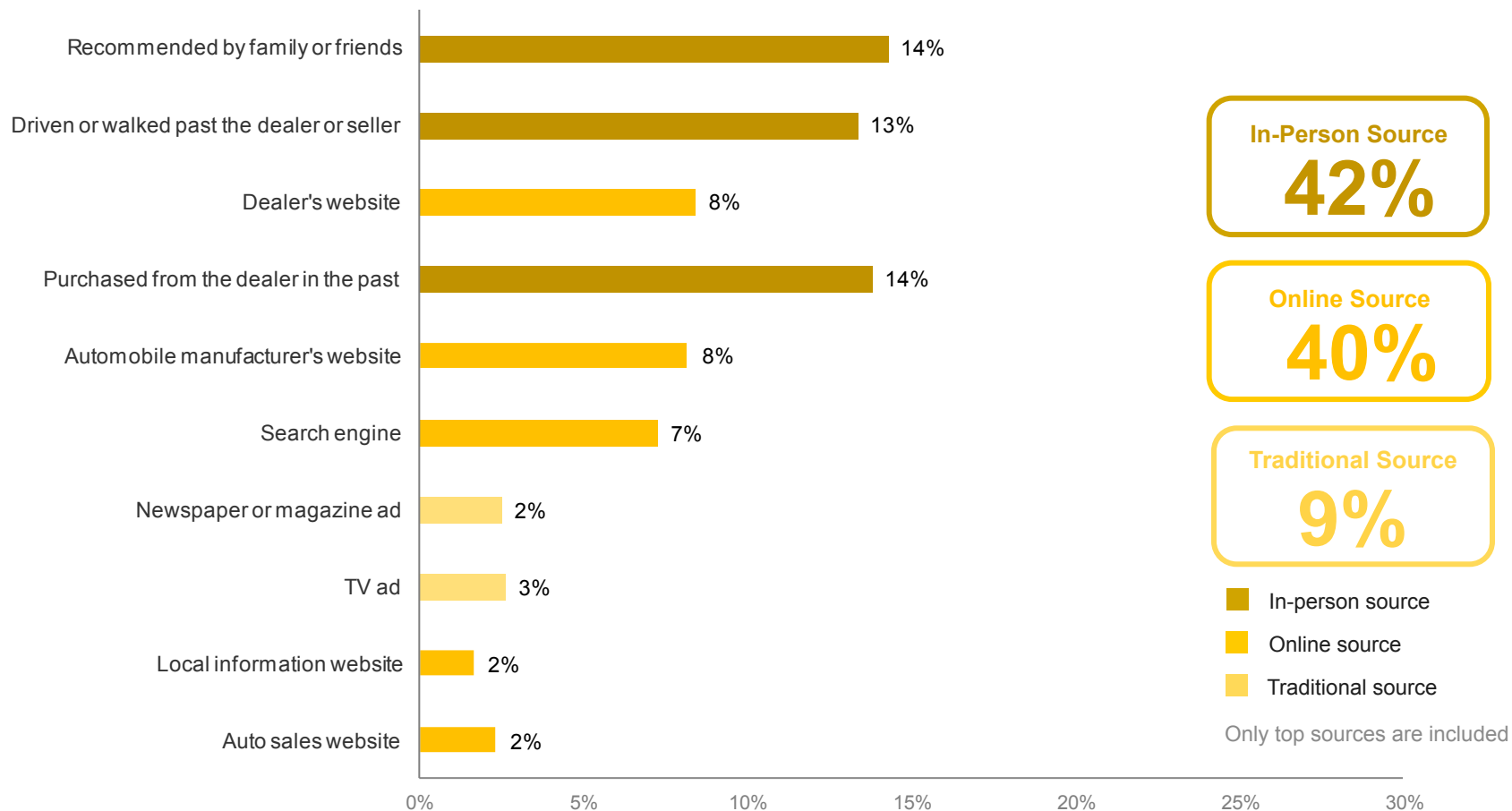
The vast majority of buyers purchased their new car from an authorized dealership



Q: Where did you purchase the automobile?

Buyers are more likely to first hear about their seller/dealer from **in-person sources**

How First Heard About Seller



Q: How did you select the seller/dealer you purchased your automobile from?

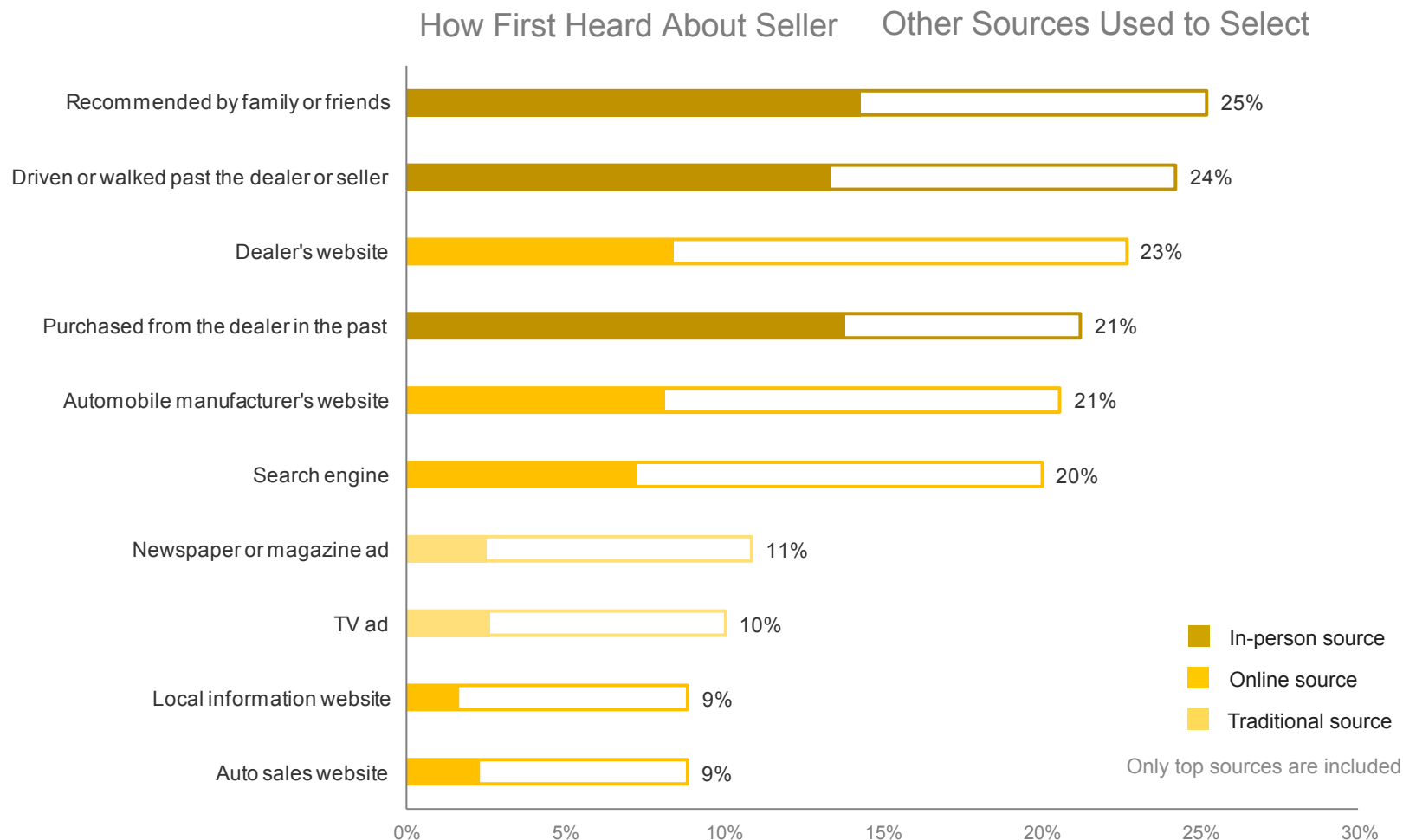
n=11056

Base: All new car buyers

Auto sales websites were not asked in China

Source: The Role of the Internet in New Automobile Purchases, Global Analysis, December 2011, Netpop Research, LLC

Overall, the top five sources for selecting a seller/dealer are **online** and **in-person**



Q: How did you select the seller/dealer you purchased your automobile from?

n=11056

Base: All new car buyers

Auto sales websites were not asked in China

Source: The Role of the Internet in New Automobile Purchases, Global Analysis, December 2011, Netpop Research, LLC

In most countries, buyers are more likely to first hear about their seller/dealer from **in-person sources**

How First Heard About Seller

■ In-person source
■ Online source
■ Traditional source

		Recommended by family or friends	Purchased from the dealer in the past	Driven or walked past the dealer or seller	Dealer's website	Automobile manufacturer's website	Search engine	TV ad	Newspaper or magazine ad	Local information website	Auto sales website
Global (n=11056)		14%	14%	13%	8%	8%	7%	3%	2%	2%	2%
AU (n=851)		11%	11%	22%	9%	9%	7%	4%	4%	2%	3%
CN (n=850)		22%	2%	7%	6%	5%	7%	4%	4%	2%	0%
FR (n=851)		11%	18%	8%	11%	9%	5%	2%	2%	1%	1%
DE (n=853)		12%	23%	14%	6%	7%	6%	2%	2%	2%	2%
IT (n=851)		16%	10%	15%	6%	8%	10%	2%	2%	2%	3%
JP (n=850)		15%	27%	15%	5%	9%	2%	2%	2%	0%	1%
KR (n=850)		28%	6%	14%	4%	7%	7%	4%	1%	1%	5%
NL (n=850)		9%	17%	16%	10%	8%	6%	2%	3%	1%	2%
PL (n=850)		7%	6%	12%	11%	7%	11%	3%	2%	2%	3%
PT (n=850)		15%	31%	11%	9%	9%	7%	1%	1%	0%	1%
ES (n=850)		13%	7%	12%	8%	8%	8%	4%	2%	3%	3%
TR (n=850)		18%	8%	12%	12%	12%	7%	3%	2%	2%	3%
UK (n=850)		7%	13%	14%	10%	8%	10%	2%	3%	2%	3%

Only top sources are included

Q: How did you select the seller/dealer you purchased your automobile from?

Base: All new car buyers

Auto sales websites were not asked in China

Source: The Role of the Internet in New Automobile Purchases, Global Analysis, December 2011, Netpop Research, LLC

In every country, **online** and **in-person** sources are primarily used to select sellers

Sources Used to Select Seller

■ In-person source
■ Online source
■ Traditional source

		Recommended by family or friends	Driven or walked past the dealer or seller	Dealer's website	Purchased from the dealer in the past	Automobile manufacturer's website	Search engine	Newspaper or magazine ad	TV ad	Local information website	Auto sales website
Global (n=11056)		25%	24%	23%	21%	21%	20%	11%	10%	9%	9%
AU (n=851)		21%	36%	30%	19%	26%	23%	16%	12%	12%	13%
CN (n=850)		44%	24%	26%	12%	26%	34%	21%	20%	16%	0%
FR (n=851)		17%	11%	21%	23%	18%	14%	6%	5%	5%	5%
DE (n=853)		21%	23%	18%	30%	18%	16%	9%	7%	6%	7%
IT (n=851)		28%	27%	19%	17%	18%	22%	11%	9%	11%	10%
JP (n=850)		20%	22%	11%	31%	15%	8%	5%	5%	2%	2%
KR (n=850)		41%	26%	13%	13%	14%	18%	9%	9%	6%	13%
NL (n=850)		17%	27%	25%	24%	20%	15%	10%	9%	6%	9%
PL (n=850)		22%	26%	31%	18%	26%	30%	15%	14%	12%	15%
PT (n=850)		25%	21%	22%	40%	22%	17%	5%	5%	3%	7%
ES (n=850)		26%	24%	21%	14%	21%	19%	12%	14%	13%	11%
TR (n=850)		29%	23%	31%	14%	25%	22%	12%	12%	11%	13%
UK (n=850)		16%	26%	27%	22%	18%	23%	11%	10%	11%	10%

Only top sources are included

Q: How did you select the seller/dealer you purchased your automobile from?

Base: All new car buyers

Auto sales websites were not asked in China

Source: The Role of the Internet in New Automobile Purchases, Global Analysis, December 2011, Netpop Research, LLC

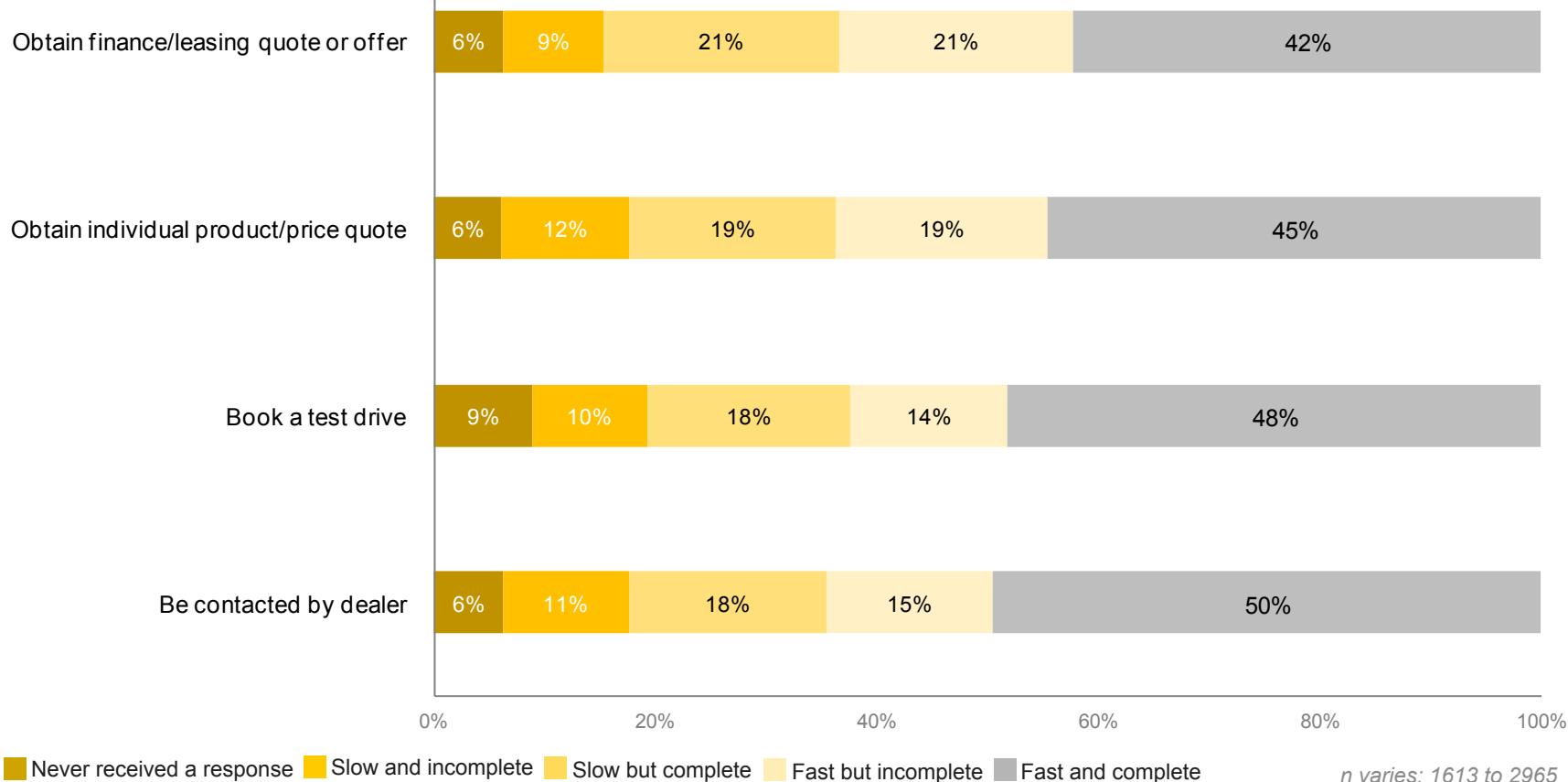
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Half or more new car buyers receive inadequate responses from dealers or manufacturers to online requests

Not “Fast and Complete”

Response from Online Request To ...



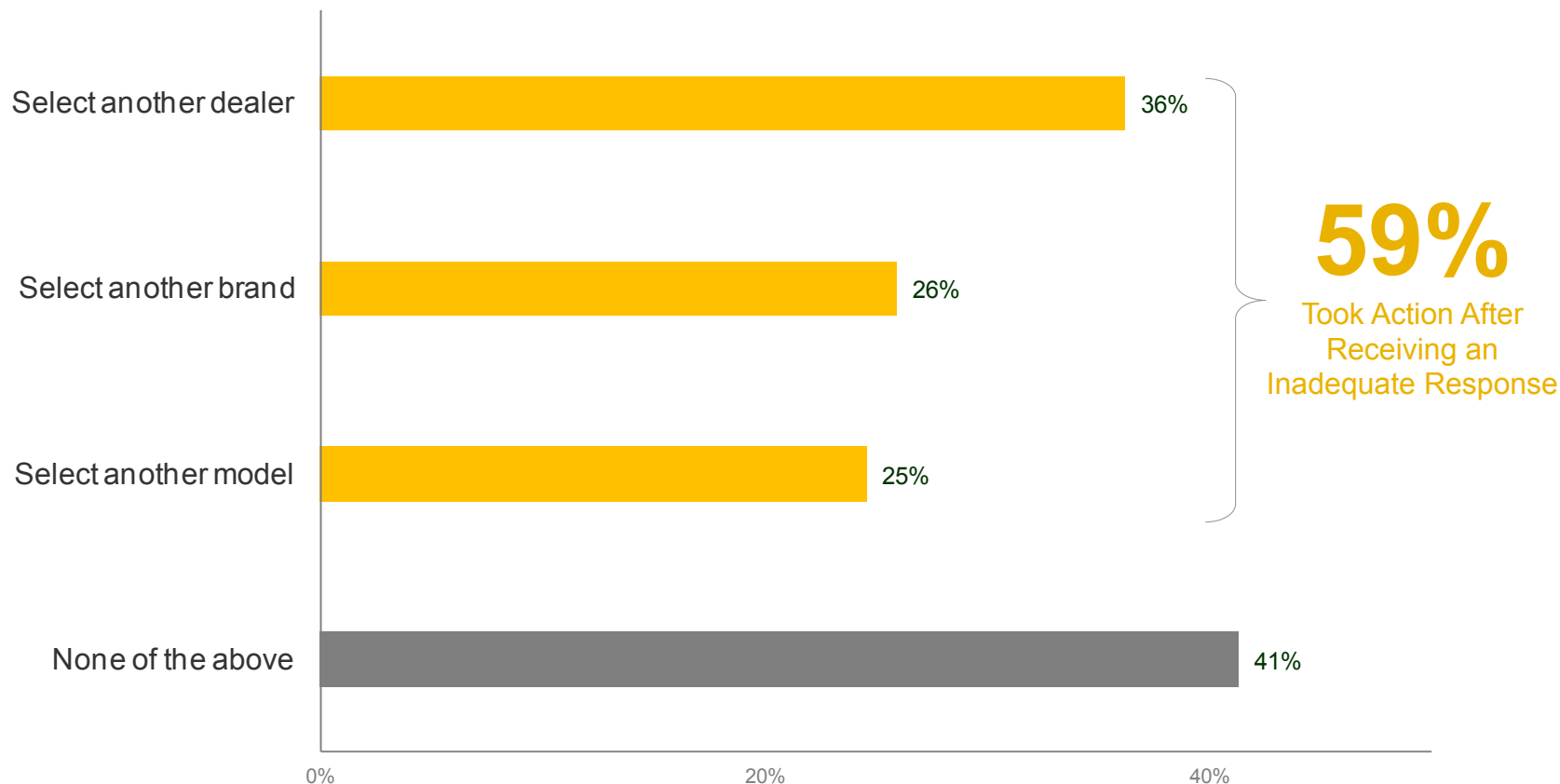
n varies: 1613 to 2965

Base: New car buyers who requested the specific type of information online from a dealer or manufacturer

Q: How would you describe the responsiveness from either dealers or manufacturers to your online requests?

Inadequate responses to online requests prompts nearly 3 in 5 to select another brand, model or dealer

“Dealer/manufacture’s inadequate response prompted me to...”



n=2491

Q: Did the dealer/manufacture’s responsiveness to your online requests prompt you to take any of the following actions?

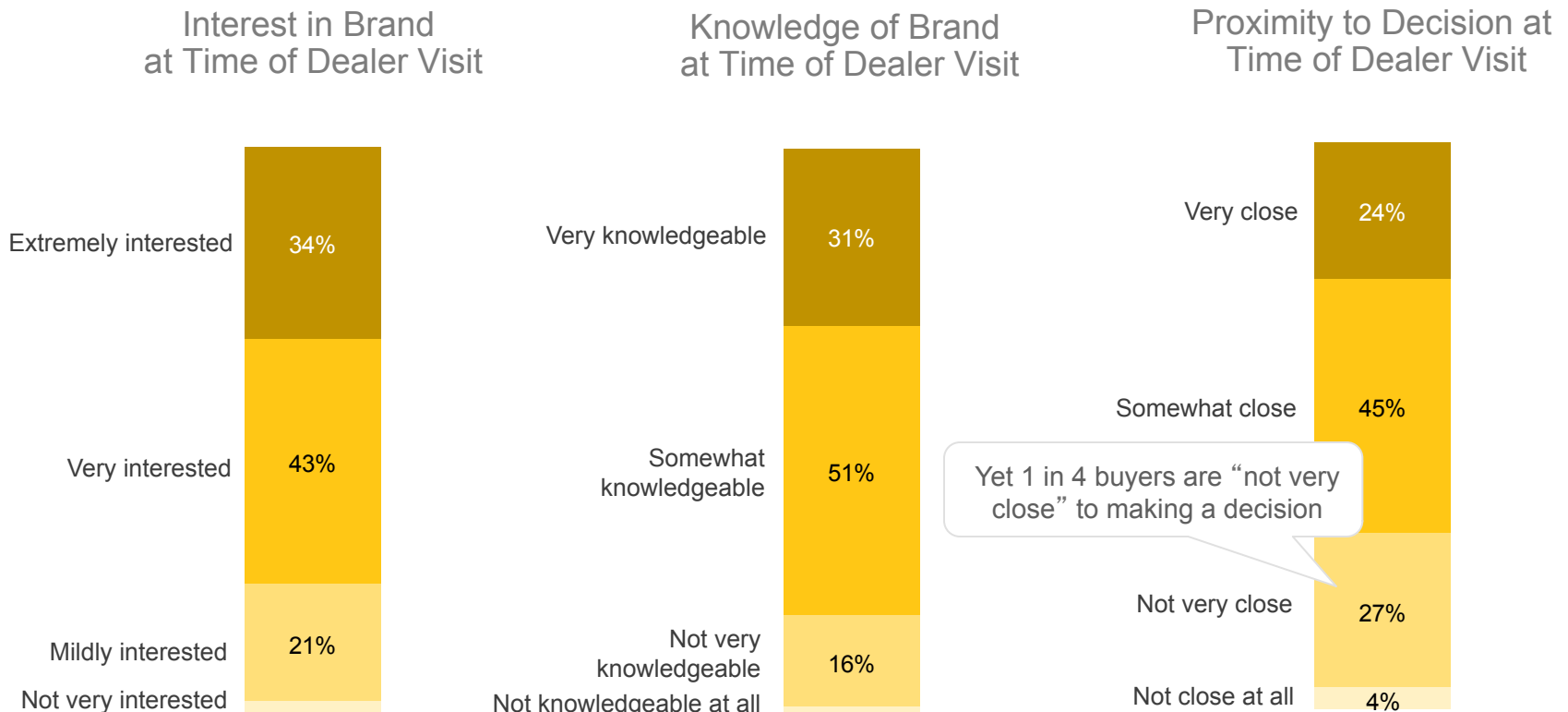
Base: New car buyers who did not get a satisfying response from a dealer or manufacturer

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Dealer Visits

Buyers generally do not visit dealerships until they are interested in, somewhat knowledgeable of, a brand



Only top 25 brands are included

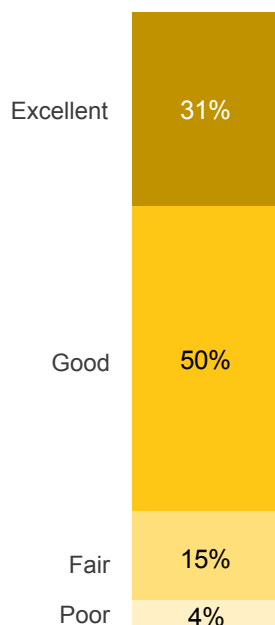
n varies: 152 to 1799

Base: All new car buyers who visited at least one dealership for the brand

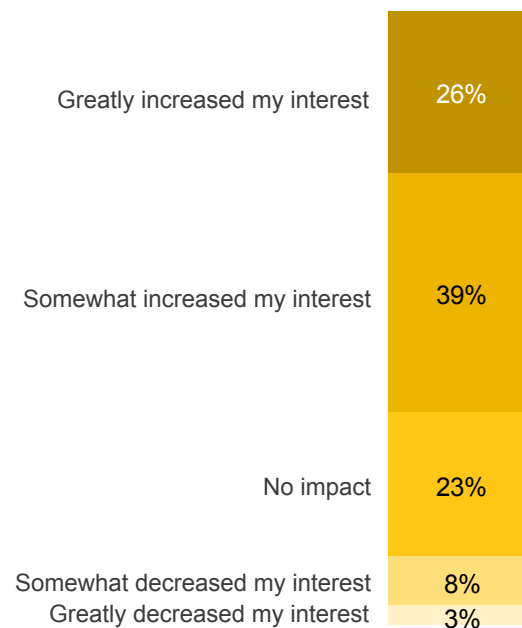
Q: Thinking back to the first time you visited a dealership for each brand, about how interested were you in the brand at that time? / When you first visited the dealership, how knowledgeable were you about the particular make-model(s) you were interested in seeing? / How close were you to making a final purchase decision when you first visited the dealership(s) for each of these brands?

Buyers are generally satisfied with their experience at dealerships, and dealer visits usually increase their interest in the brand

Overall Experience of Dealer Visit



Impact of Dealer Visit on Interest in Brand



Only top 25 brands are included

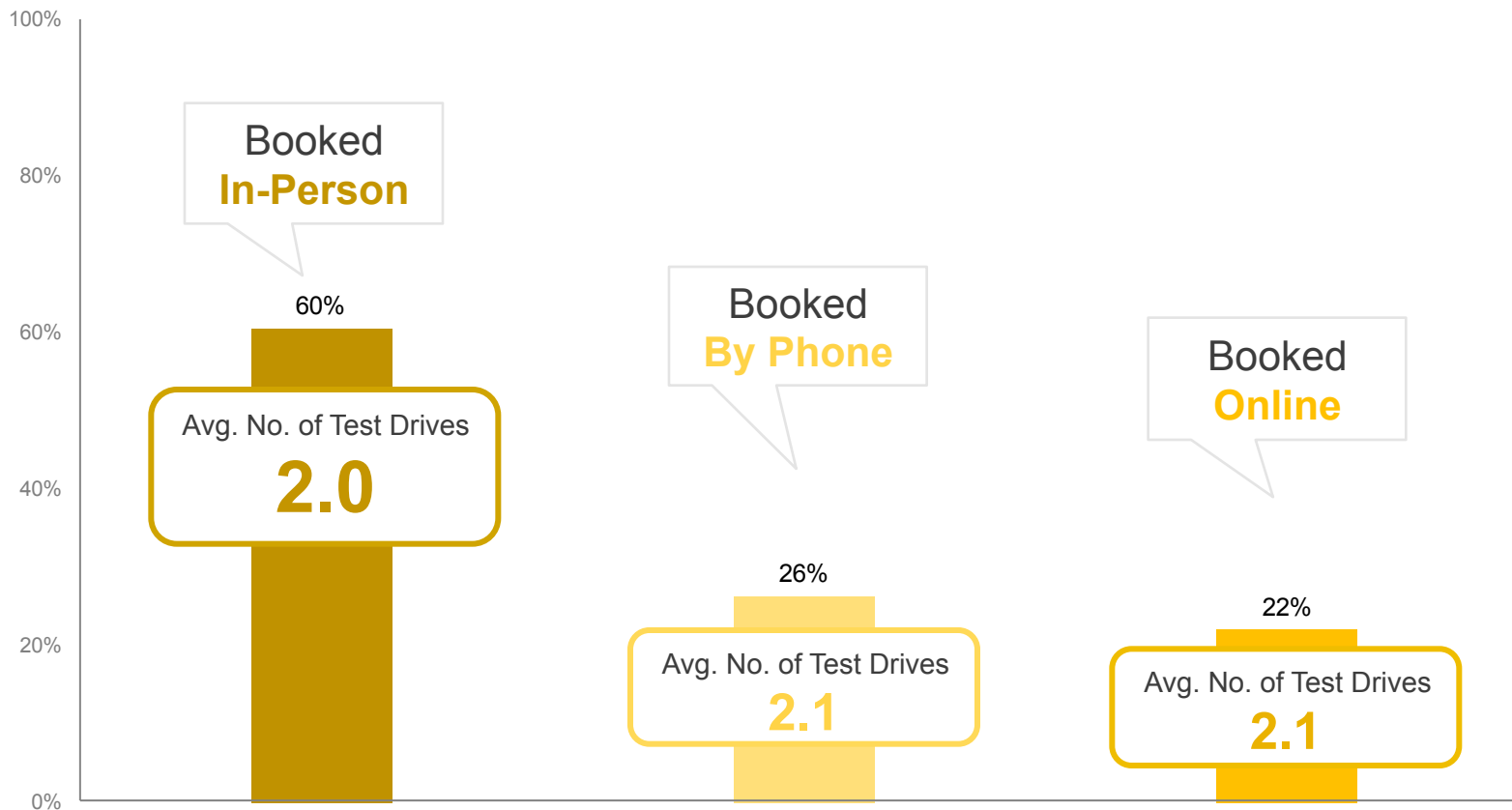
n varies: 152 to 1799

Base: All new car buyers who visited at least one dealership for the brand

Q: How would you rate your overall experience at the dealership(s) you visited for each brand? / What impact did visiting the dealership(s) have on your interest in buying a particular make-model?

Most buyers book test drives **in-person** (60 percent)

Percent Who Booked Test Drive(s) by Channel

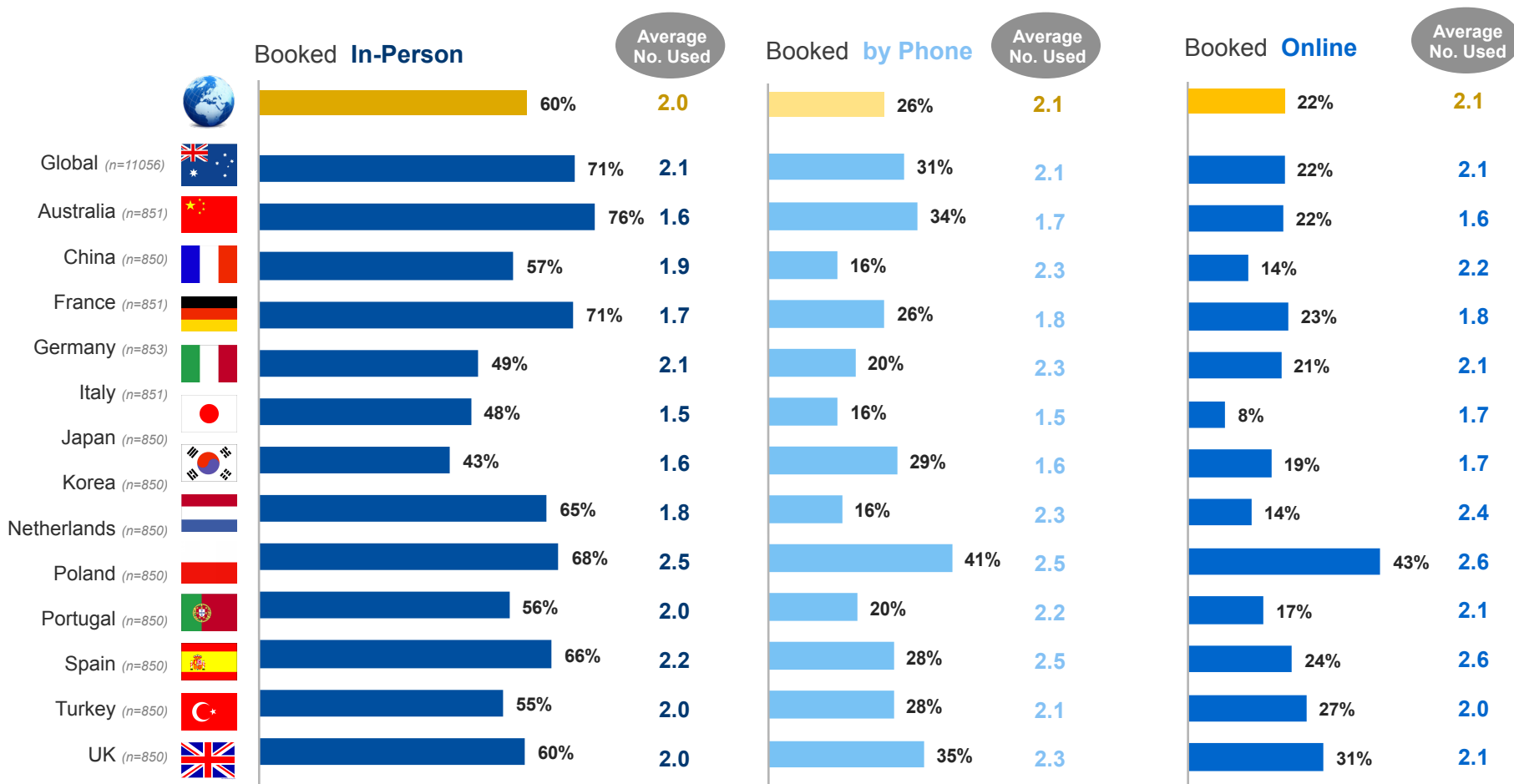


Q: How many test drives did you book? Please select a number for each method of booking.

n=11056
Base: All new car buyers

In every country, the most popular way to book a test drive is in-person

Percent Who Booked Test Drive(s) by Channel



Q: How many test drives did you book? Please select a number for each method of booking.

Base: All new car buyers

Conclusions

Conclusions

1

On a global level, the most important sources for researching a new automobile are auto dealerships, search engines and manufacturer websites. Beyond these sources, friends and family and dealer websites are next in importance. Only five traditional media sources appear among the top 20 most used and valued sources, underscoring the diminishing influence of traditional media over new car purchases.

2

At least one-third of new car buyers use the Internet at every phase of the car-buying process. Over two-thirds use the Internet to gather information and compare and refine options. The Internet is not only widely used but highly valued, particularly in the initial phases of research. Among specific online sources, search engines, manufacturer websites and dealer websites are used and valued most.

3

This study examined over 15 key activities in the car-buying process and asked buyers to identify the activities they had done online. Findings show that more than half of buyers use the Internet to do activities related to gathering information on cars and/or arranging financing. In addition, approximately 1 in 3 buyers consider the Internet "most influential" for key milestones in the purchase process, including modifying which makes and/or models they consider.

4

Buyers across countries generally share the same attitudes and behaviors around buying a new car. However, there are certain differences by country: China has the highest percent of buyers who are new to market (67 percent); buyers in Turkey are most likely to ultimately purchase a brand they discovered during research (25 percent); auto dealership are more important for buyers in Germany, France, and Japan while friends/family and automotive magazine websites are more important in China.

5

As noted above, search engines are the most used and valued online source for new car buyers, particularly at the early and middle phases of the decision process. Overall, 65 percent of new car buyers use search engines either as a primary source or gateway to other sources. Almost all car buyers who use search engines during the purchase process use Google (83 percent).

Conclusions

6

Online videos play an increasingly important role in the purchase of new automobiles. Today, over half (54 percent) watch online auto videos during the research process, typically the online version of a TV commercial or other videos produced by manufacturers. Buyers who watch online auto videos say they are appealing (92 percent) and have a favorable impact on brands (79 percent).

7

Thanks to the proliferation of smartphones, mobile devices are becoming an important way for car buyers to conduct research. For example, approximately 1 in 3 buyers who use search engines say they access those sites on a mobile device. Popular research activities done on a mobile device include reading automobile reviews, finding out about a particular model, and comparing specs between models.

8

The automotive market is a crowded one, with many brands vying for attention. In the end, one brand is selected – typically a volume brand that had not been owned previously. Most buyers are looking for value. Even those who had initially considered a luxury brand ultimately buy a volume brand. But they are also looking for something new, based on the percent of repeat buyers who "switch."

9

The vast majority of buyers purchased their new car from an authorized dealer (79 percent). Two in five buyers first learned about their seller/dealer through an online source, usually the manufacturer or dealer website or a search engine. Traditional sources play a lesser role in this regard, with only nine percent saying they first heard about their seller/dealer through a traditional source.
