

# Car Buyers

Examining the attitudes and digital behaviors of internet users planning to purchase a car in the next 3-6 months

AUDIENCE REPORT 2019

[globalwebindex.com](https://globalwebindex.com)





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# Introduction

GlobalWebIndex Audience reports are designed to examine the digital behaviors of a particular group – showcasing trends over time as well as analyzing how the audience in question compares to the overall internet population. In this report, we place the spotlight on **car buyers** – those internet users who are planning to purchase a car in the next 3-6 months. This report focuses on:

- ✔ **Profiling Car Buyers** – from their demographics to their attitudes and interests, what are the defining characteristics of this group?
- ✔ **Media Consumption** – where do car buyers spend most of their time online and offline?
- ✔ **Social Media Behaviors** – what are car buyers’ favorite social media platforms and who do they prefer to “follow” on these services?
- ✔ **Ecommerce and the Purchase Journey** – how many are shopping online each month and how does this audience discover and research cars? What can brands do to reach car buyers in the U.S. and UK?
- ✔ **Outlook on the Automotive Industry** – what’s the stage of car buying and what factors impact private car ownership today?

## METHODOLOGY

All figures in this report are drawn from GlobalWebIndex’s online research among internet users aged 16-64. We only interview respondents aged 16-64 and our figures are representative of the online populations of each market, not its total population.

Each year, GlobalWebIndex interviews over 575,000 internet users aged 16-64 via an online questionnaire. A proportion of respondents complete a shorter version of this survey via mobile, hence the sample sizes presented in the charts throughout this report may differ as some will include all respondents and others will include only respondents who completed GlobalWebIndex’s Core survey via PC/laptop/tablet.

When reading this report, please note that we use a mixture of global data from our ongoing quarterly global research, as well as data from a bespoke study conducted only in the U.S. and UK. This bespoke study’s objective was to dig deeper into the purchase journey of car buyers. In this study, we interviewed 2,039 respondents in the U.S. and 2,390 respondents in the UK.

Throughout this report we refer to indexes. Indexes are used to compare any given group against the average (1.00), which unless otherwise stated refers to the global average. For example, an index of “1.20” means that a given group is 20% above the global average, and an index of “0.80” means that an audience is 20% below the global average.

## DEFINING CAR BUYERS

In our global Core research, car buyers are defined as internet users who say they are planning to purchase a car/ automobile in the next 3-6 months. This definition rendered a sample of 22,036 car buyers aged 16-64 across 41 markets.

In our bespoke survey, car buyers are defined as internet users who are planning to upgrade or buy a new car within the next 2 years. This definition rendered a sample of 909 (U.S.) and 779 (UK) car buyers aged 16-64.

# Key Insights

01

**Almost a quarter of the global online population are planning to buy a car in the next 3-6 months.**

Car buyers are young affluent consumers and 84% of them already own at least one other car, which is most likely a petrol vehicle. They are typically in their early 30s, living in an urban environment (75%) married (54%) and 56% have at least one child.

02

**Car buyers have reached the mobile tipping point.**

In 2019, this audience spend just over half of online time on their mobiles (51%), compared to 42% three years ago. The youngest cohort we track – 16-24-year-olds – spend the most time on digital media (7h 50m), 55% of which is on mobile. The fact that 45-64s are the only age group that’s still spending more time on PCs/laptops illustrates what a digitally-savvy and mobile-first audience car buyers are.

03

**Linear TV still captures more of their time spent on entertainment than online TV.**

Although car buyers generally spend more time on digital forms of media, linear TV is the only traditional channel that still captures more of this audience’s time compared to its online equivalent. However, this is not true for 16-24s who, in 2019, spend slightly longer watching online TV (1:42) than linear TV (1:39), and this will likely be the case soon for 25-34s too.

04

**Car buyers are multi-networkers on social media.**

They have around 11.7 accounts (3.3 more than the global average), so they’re a relatively easy subgroup to find online. Car buyers outside China are most likely to have an account with Facebook, but YouTube tops the charts when it comes to visitation figures. The visual and inspirational nature of Instagram is also appealing to this consumer segment, surpassing both Facebook Messenger and WhatsApp for visitation.

05

**Digital channels work well for car discovery and research, but the purchase is most likely to happen in dealerships.**

Although most car buyers in the U.S. and UK (64%) would first and foremost consider going to a brand specific dealership, buying from an automobile sales website is still a likely outcome for 48% of this audience, being especially prominent among men (52%).

06

**Positive reputation in the automotive industry is paramount for driving sales.**

This audience are keen to provide their opinion about brands online. They are 34% more likely than average to have posted a review of a product or company in the past month, but car brands need to meet certain expectations first. High quality products and financial rewards are the most likely incentives that would turn car buyers into advocates.



01

Car Buyers

# Profiling Car Buyers



# Profiling Car Buyers

## DEMOGRAPHIC PROFILE

% of car buyers who fall into the following groups

### Gender



### Age



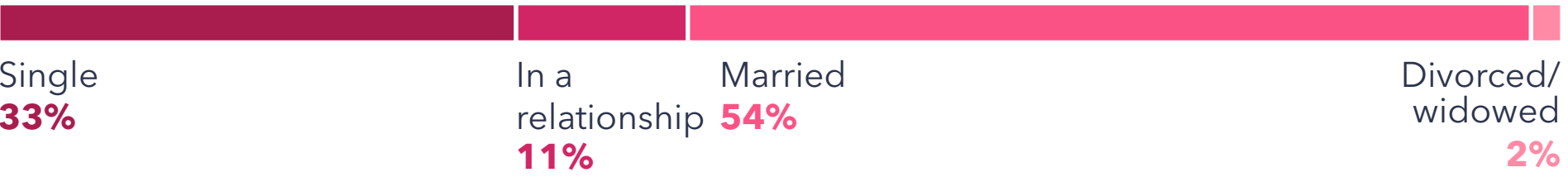
### Income



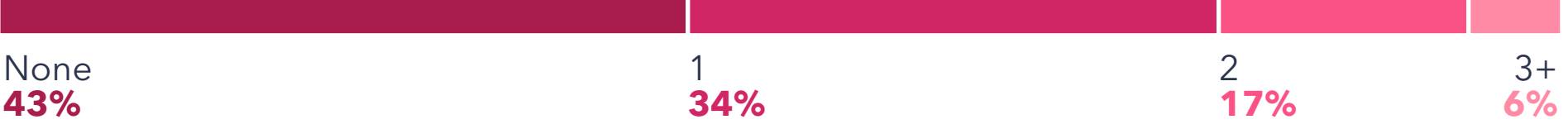
### Urban Context



### Marital Status



### Number of Children



### Number of Cars Owned



**Question:** Which of these items are you/your household thinking about purchasing in the next 3-6 months? (Car/automobile)  
**Source:** GlobalWebIndex Q2 2019 **Base:** 22,036 car buyers aged 16-64



# Profiling Car Buyers

23% of the global online population are thinking about purchasing a car in the next 3-6 months. **Car buyers are affluent consumers (they are 27% more likely to be in the top 25% income bracket) and 84% of them already own at least one car.** They are typically in their early 30s, married (54%) and 56% have at least one child.

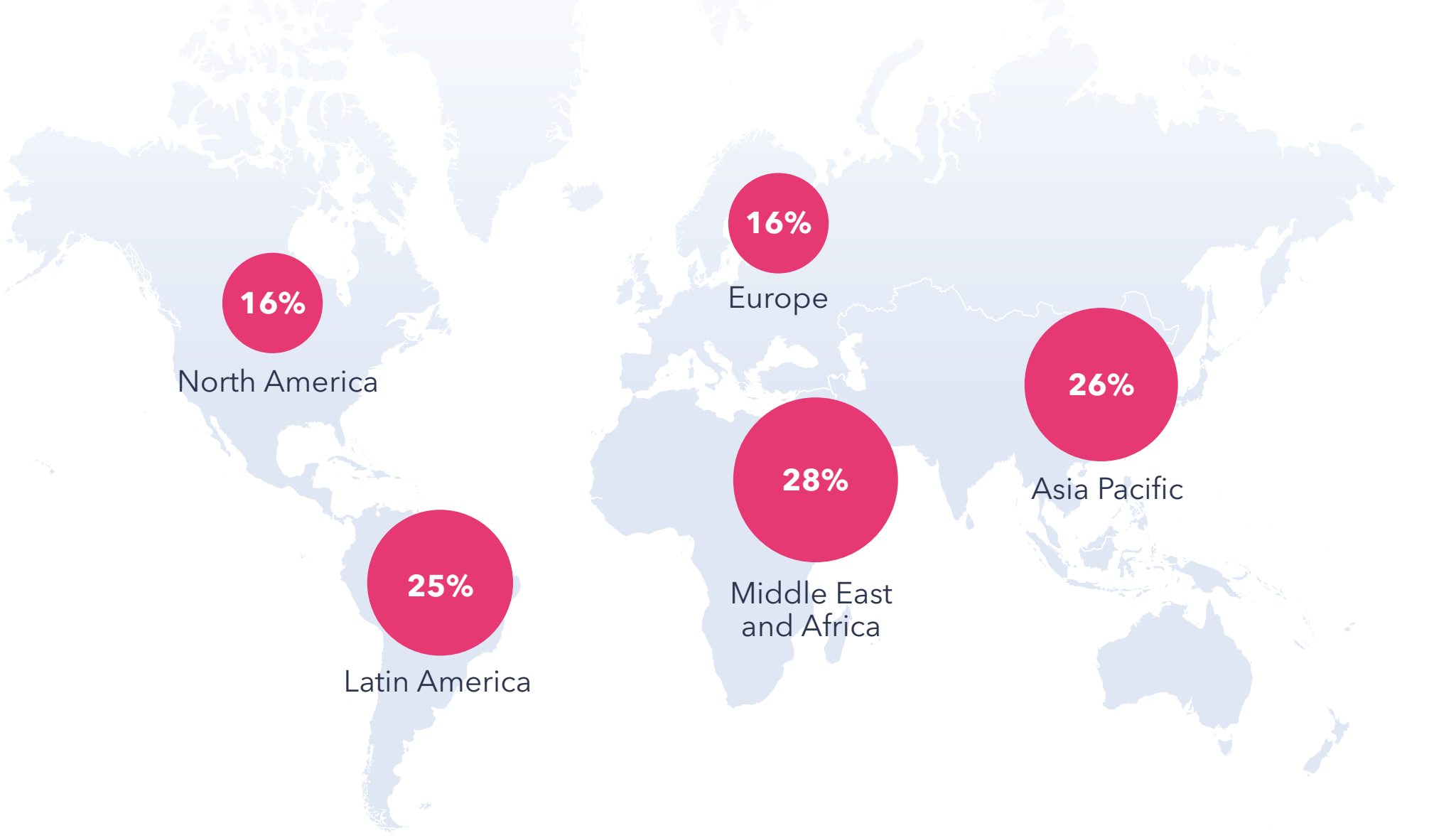
Car buyers are 40% more likely than average to fall into our **cosmopolitan** attitudinal segment (32% do), meaning that they like to explore the world around them (76% say this), like to be surrounded by different people, cultures,

ideas and lifestyles (76% say this) and are interested in other cultures and countries (75% say this).

**Regions characterized by fast-growth markets, where internet users are typically younger and wealthier, are home to the highest proportion of car buyers** and this is where the most opportunity in the market lies. Online adults in the Middle East & African (28%) region are almost twice as likely as those in Europe (16%) and North America (16%) to plan to buy a car in the next 3-6 months.

## CAR BUYING BY REGION

% of internet users in each region who are thinking about purchasing a car in the next 3-6 months



Car buyers are:

**35%**  
**MORE likely to say they would buy a product/service simply for the experience of being part of the community**

**30%**  
**MORE likely to consider themselves to be much more affluent than the average**

**29%**  
**MORE likely to be comfortable borrowing money**
























**Question:** Which of these items are you / your household thinking about purchasing in the next 3-6 months? (Car/automobile)  
**Source:** GlobalWebIndex Q2 2019 **Base:** 139,658 Internet Users aged 16-64























# Car Brands Around the World

CAR BRANDS AROUND THE WORLD

% of car buyers who currently have the following brands/would advocate the following brands to others

	Have Now		Would Advocate	
 Argentina	Ford	18%	Volkswagen	11%
 Australia	Toyota	21%	Toyota	14%
 Austria	Volkswagen	19%	Mercedes-Benz	12%
 Belgium	Ford	15%	Audi	7%
 Brazil	Chevrolet	19%	Chevrolet	17%
 Canada	Honda	14%	Honda	11%
 China	Volkswagen	12%	Volkswagen	7%
 Colombia	Chevrolet	17%	Chevrolet	17%
 Denmark	Ford	10%	Volkswagen	6%
 Egypt	Chevrolet	9%	Hyundai	6%
 France	Renault	25%	Peugeot	15%
 Germany	Volkswagen	15%	Audi	10%
 Hong Kong	Toyota	11%	Mitsubishi	5%
 India	Honda	18%	Honda	14%
 Indonesia	Toyota	25%	Toyota	18%
 Ireland	Volkswagen	16%	Volkswagen	12%
 Italy	Fiat	30%	Fiat	15%
 Japan	Toyota	24%	Honda	15%
 Malaysia	Proton	38%	Perodua	18%
 Mexico	Nissan	20%	Nissan	17%
 Netherlands	Volkswagen	14%	Volkswagen	10%

	Have Now		Would Advocate	
 New Zealand	Toyota	23%	Toyota	14%
 Philippines	Toyota	18%	Toyota	12%
 Poland	Volkswagen	14%	Audi	8%
 Portugal	Peugeot	14%	Audi	8%
 Romania	Volkswagen	18%	Volkswagen	12%
 Russia	Lada	17%	Lada	9%
 Saudi Arabia	Toyota	31%	Toyota	23%
 Singapore	Honda	17%	Honda	8%
 South Africa	Volkswagen	22%	Toyota	17%
 South Korea	Hyundai	39%	Hyundai	17%
 Spain	Renault	13%	Renault	7%
 Sweden	Volvo	30%	Volvo	17%
 Switzerland	Volkswagen	10%	Volkswagen	8%
 Taiwan	Toyota	27%	Toyota	14%
 Thailand	Toyota	40%	Toyota	24%
 Turkey	Volkswagen	10%	Volkswagen	8%
 UAE	Toyota	26%	Toyota	20%
 UK	Ford	12%	Ford	7%
 U.S.	Toyota	17%	Toyota	12%
 Vietnam	Ford	27%	Ford	13%



**Question:** Has your household ever owned cars from any of these brands? This includes any cars owned / leased by you personally, or by anyone else in your household. | Which of these brands would you advocate to others (e.g. write / post positive reviews about, recommend to family / friends)?  
**Source:** GlobalWebIndex Q2 2019 **Base:** 22,036 car buyers aged 16-64



02

Car Buyers

# Media Consumption



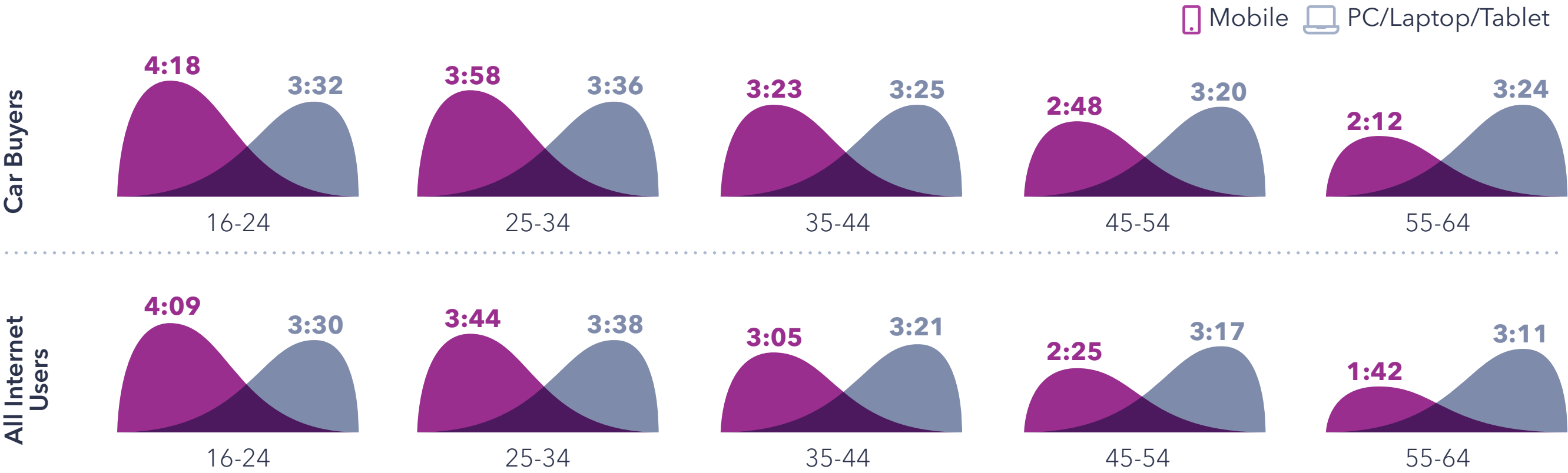
# Time Spent Online

Car buyers are heavy consumers of both traditional and digital media. **They spend an average of 13h 9m on different kinds of media every day (1h 28m longer than the average internet user), though this is likely happening simultaneously rather than sequentially.** Growing media time is mostly down to the importance of mobiles in the lives of this consumer segment. More than 7 in 10 of them say the mobile is the most important device to access the internet, up from 49% in 2016. In 2019, car buyers spend just over half of online time on their mobiles (51%), compared to 42% three years ago, meaning that car buyers have reached the mobile tipping point.

This varies by age though. **Our youngest cohort - 16-24-year-olds - spend the most time on digital media (7h 50m), 55% of which is on mobile.** At the other end of the spectrum, 55-64s spend around 5h 36m online (which is still almost 45 minutes longer than all 55-64s online consumers worldwide) and only 39% of this time is on mobile. The fact that **45-64s are the only age group that's still spending more time on PCs/laptops** illustrates what a digitally-savvy and mobile-first audience car buyers are. However, it's important to note that the bigger screens are not yet being abandoned. They still command almost half of daily online time and maintain their position in the multi-device digital profiles of these consumers, especially in Europe and North America. Mobile-only strategies, therefore, shouldn't yet be the default with this audience.

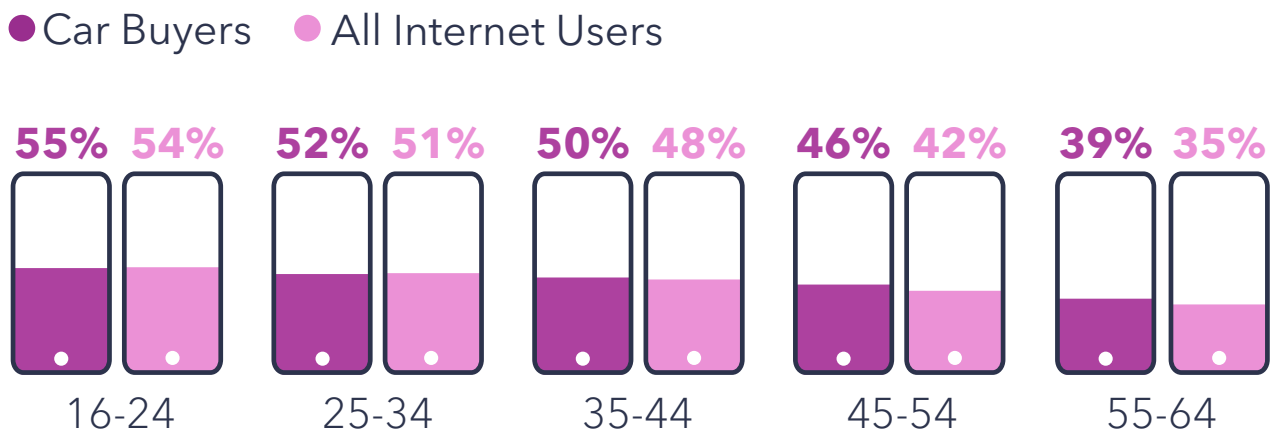
## TIME SPENT BY DEVICE

Average time in h:mm spent per day on the following



Between 2016 and 2019, time spent online on a mobile has increased by over half an hour. In line with the global picture, car buyers reached the mobile tipping point in 2019

Proportion of online time spent on mobile

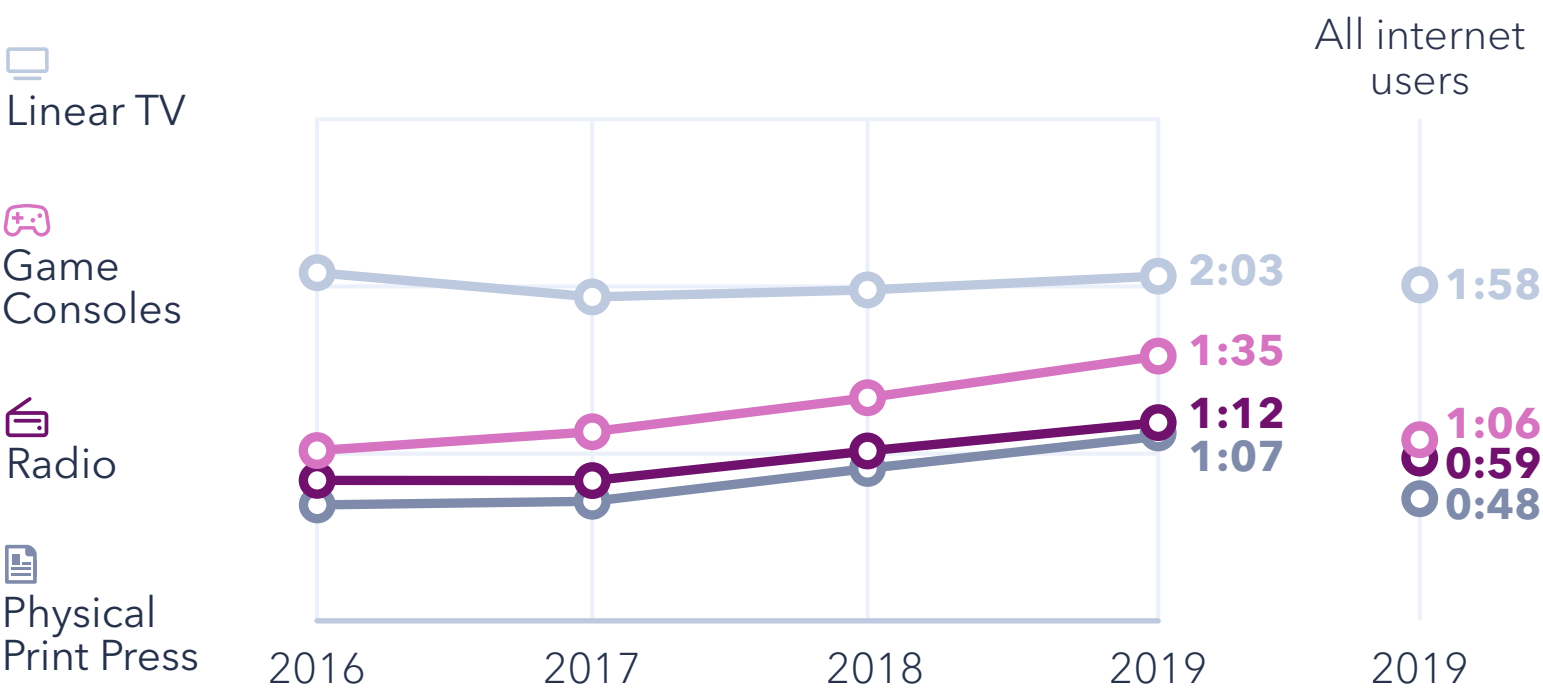


**Question:** On an average day, how long do you spend online on a mobile/ PC / laptop / tablet?  
**Source:** GlobalWebIndex 2019 (Averages conducted of waves between Q1 and Q2 2019) **Base:** 45,298 car buyers and 279,055 internet users aged 16-64



# Traditional vs. Digital Consumption

TRADITIONAL MEDIA | Average time in h:mm spent per day on the following



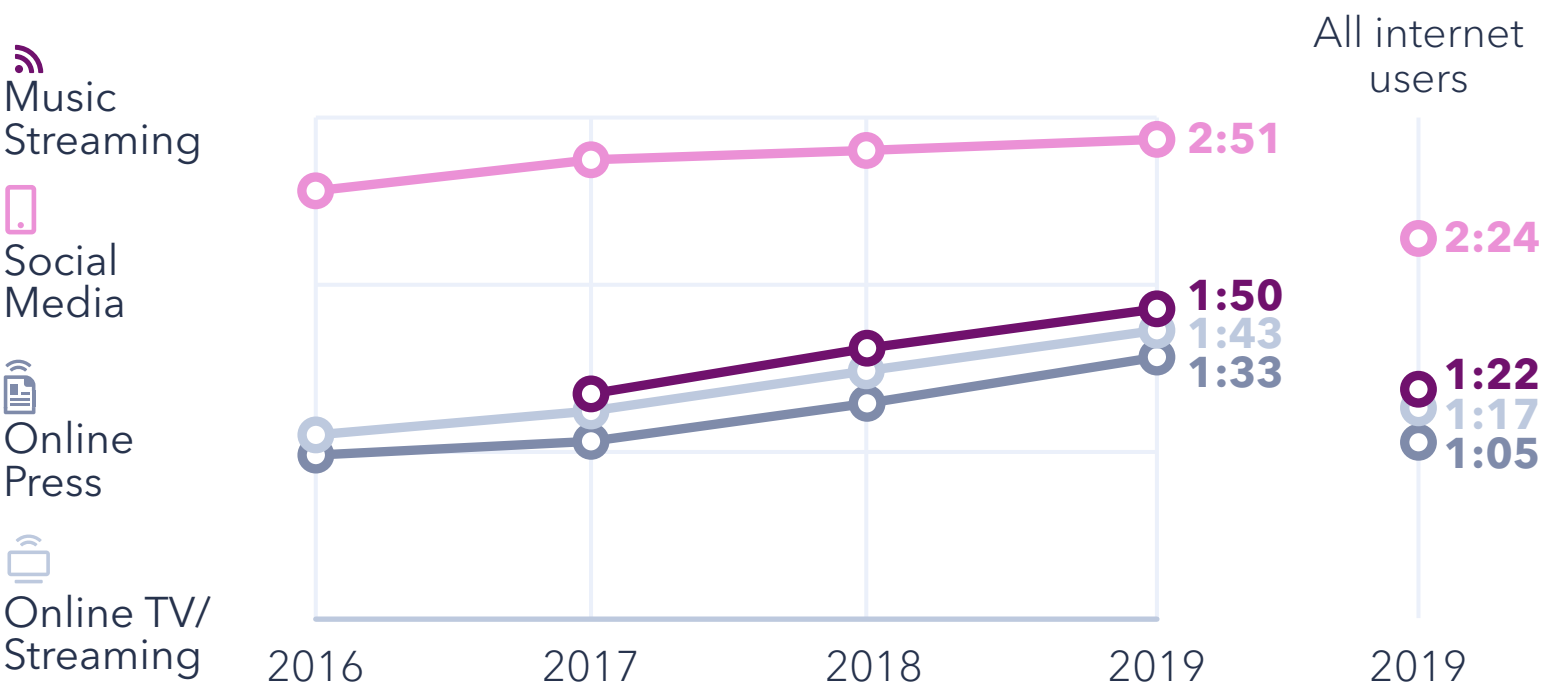
Although car buyers today spend more time on digital forms of media (7h 12m), linear TV (2h 3m) is the only traditional channel that still captures more of this audience’s time compared to its online equivalent (1h 43m). **This is not true for 16-24s who, in 2019, spend slightly longer watching online TV (1:42) than linear TV (1:39),** and this will likely be the case soon for 25-34s too. Asia Pacific is the only region where time spent on online

TV (1h 50m) has started to overtake traditional forms of TV (1h 48m) for this group, while Europe is where car buyers are consuming more of the latter (2h 25m) than they are of the former (1h 16m).

**When it comes to reading press and listening to music, car buyers are devoting more time to online forms of this media, but time spent on traditional forms is still growing.**

Half of car buyers have used news apps in the past month and 56% have used music apps, providing an accessible source of in-car entertainment. National Geographic (used by 40%) and CNN (used by 38%) is where most of this audience engage with the news online, while Google Play Music (used by 35%) and Spotify (used by 32%) is where they tend to listen to music.

DIGITAL MEDIA | Average time in h:mm spent per day on the following

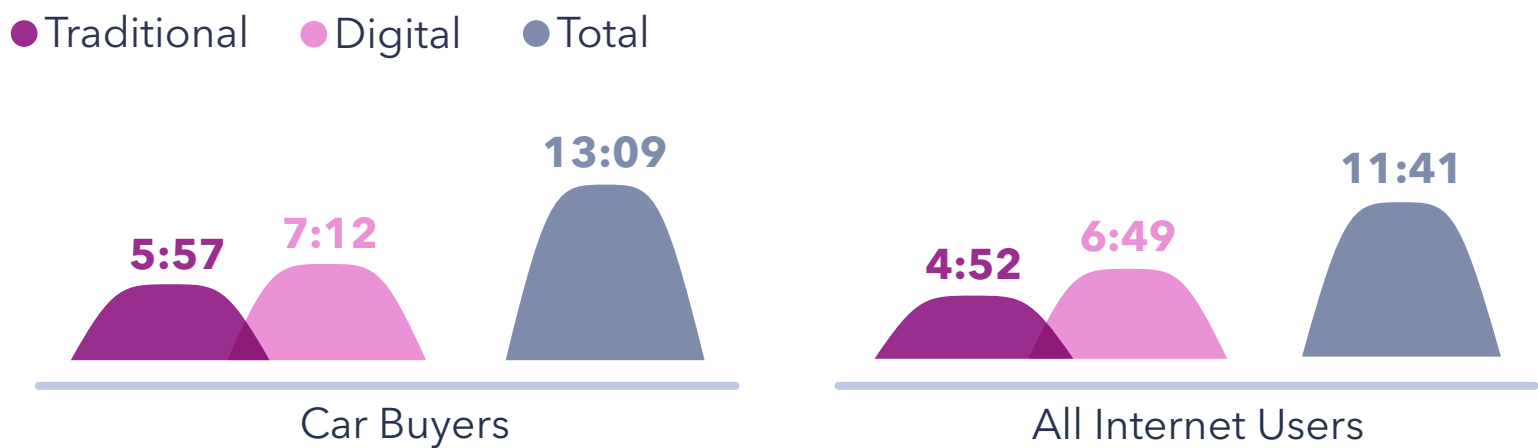


Please note we didn't track music streaming in 2016

**16-24-year-old car buyers and those in APAC spend longer streaming TV than watching linear TV**

TRADITIONAL VS. DIGITAL MEDIA CONSUMPTION

Average time in h:mm spent per day on...



**Question:** On an average day, how long do you spend on these media?  
**Source:** GlobalWebIndex 2016-2019 (Averages of waves conducted between Q1 2016-Q2 2019)  
**Base:** 19,217 (2016), 31,492 (2017), 60,494 (2018), 45,298 (H1 2019) car buyers aged 16-64



# TV Engagement

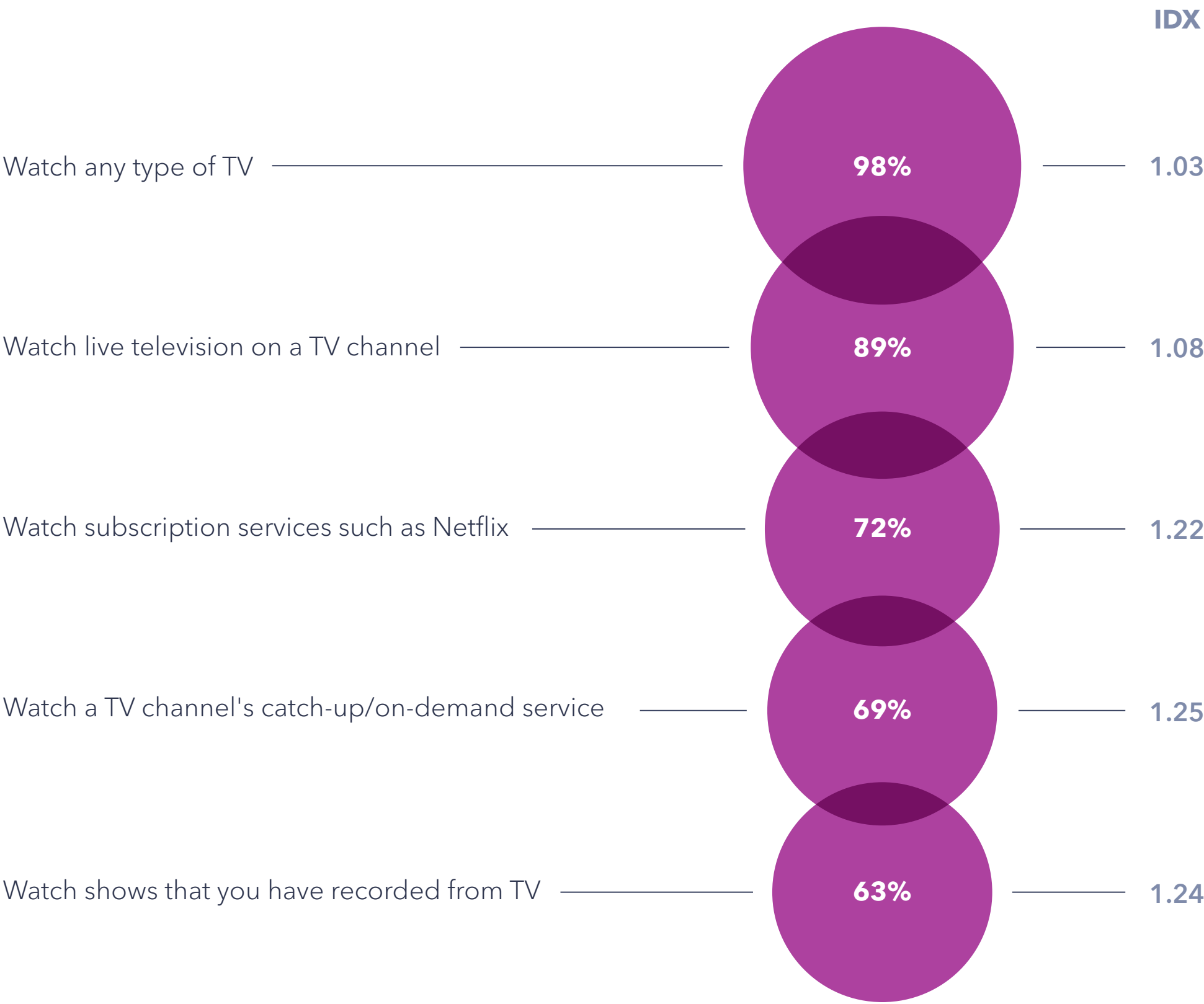
With almost 9 in 10 car buyers watching linear TV at least once a week, the continued strength of this type of media in daily schedules is clear. And while a traditional TV set is the primary device for TV-based behaviors (67% watch traditional TV on a TV set), **car buyers are more likely to be reaching for their laptop when watching subscription-based services like Netflix** (46% do). This is not yet the case in Europe, MEA and North America, where bigger screens are still preferred for streaming TV.

Out of the 206 streaming services we track, **Netflix emerges as the dominant platform this group engages with**, used by 67% outside China each month. Of these, 65% pay for a premium account, but 4 in every 10 share their account with other people.

**4 in 10 car buyers have watched content on a TV by mirroring on casting it via their phone in the past month (Index 1.33)**

## TYPES OF TV WATCHED

% of car buyers who watch the following types of TV at least once a week



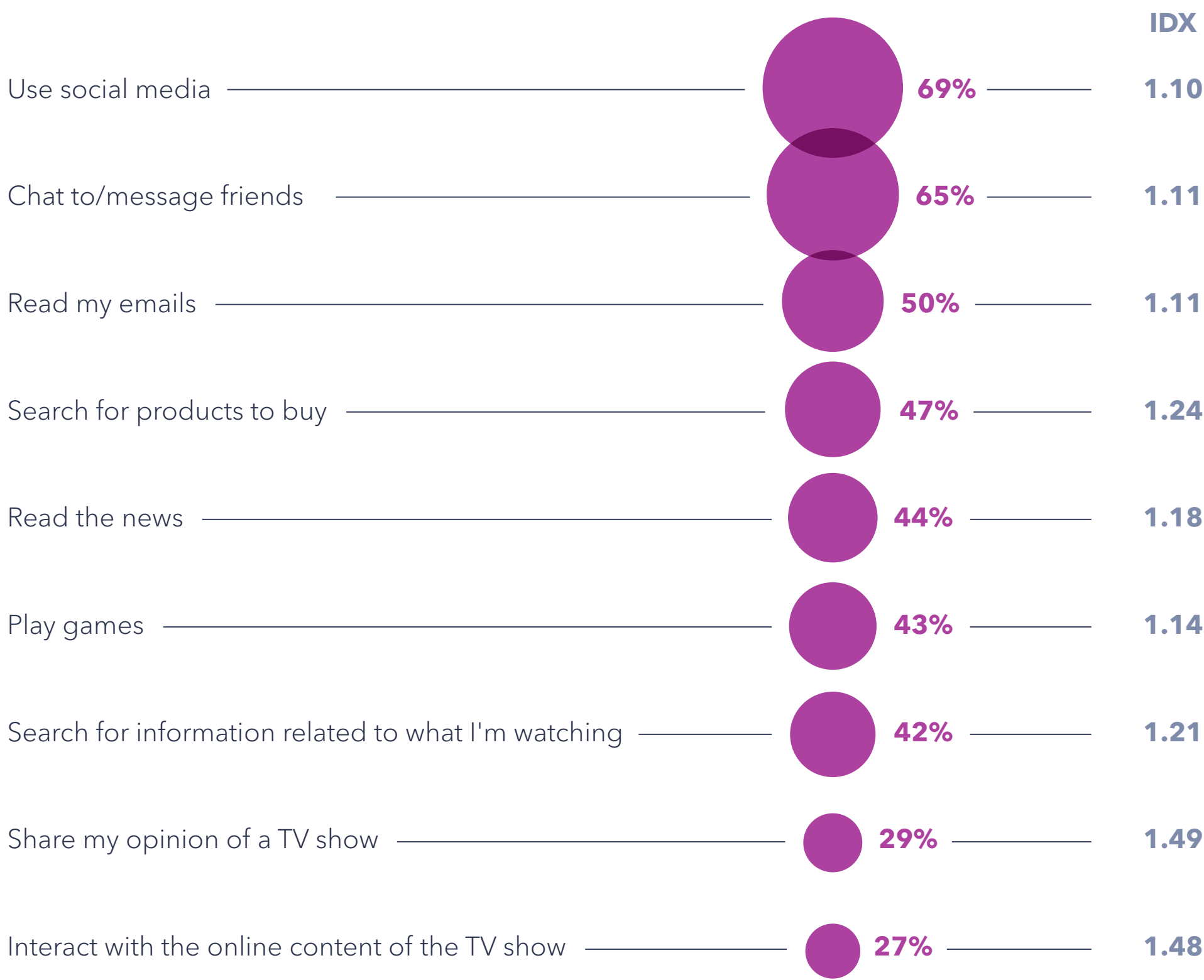
**Question:** How often do you watch these types of TV?  
**Source:** GlobalWebIndex Q2 2019 **Base:** 22,036 car buyers aged 16-64



# Second-Screening

## SECOND-SCREENING BEHAVIORS

% of car buyers who do the following online while watching TV



As we mentioned earlier, these online adults spend the majority of their day consuming different media simultaneously, and this can be attributed to second-screening. In fact, **93% of car buyers use another device while watching TV**, and the large majority (89%) are on their mobiles. Similar to many second-screener, this consumer segment is most likely using social networks (69%) or chatting to friends (65%) on their second screen. Perhaps most striking here is car buyers' **above-average likelihood**

**to share their opinion of a TV show (Index 1.49) and to interact with the online content of it (Index 1.48)**, which presents clear opportunities for brands to engage this audience while dual-screening.

Car buyers are evidently keen to join in the conversation on social media while watching TV; they are 41% more likely than other Twitter users to tweet about the TV show they are currently watching (21% have done so in the past month), and 43%

more likely to post a similar comment on Facebook (22% have done so). This could pave the way for intelligent marketing, joining in with this live conversation on social media, and posting content that resonates with this highly engaged audience. Given that almost **half search for products to buy while watching TV and 57% say they tend to buy products they see advertised**, the opportunity to grab car buyers' attention while watching TV is clear.

**89% of car buyers are on their phones while watching TV, rising to 92% among 16-24s**



**Question:** Which of these things do you do online when watching TV?  
**Source:** GlobalWebIndex Q2 2019 **Base:** 22,036 car buyers aged 16-64



03

Car Buyers

# Social Media Behaviors



# Social Platforms

Car buyers spend an average of 2h 49m on social media in Q2 2019 but, with accounts across multiple platforms, this time is spread out. This is an audience of multi-networkers; they have around 11.7 accounts (3.3 more than the global average), so they're an easy consumer segment to find online.

In line with global trends, Facebook just about takes the title for membership outside China, and can claim to have one of the greatest cross-age appeals. YouTube, however, leads

for visitor/user numbers at 92%, giving the platform the biggest overall reach and reiterating the importance of online video and entertainment. This means that car buyers can be targeted effectively through video content on the service.

Generally, though, Facebook's importance in the lives of this audience shouldn't be underestimated. In fact, 4 of the top 5 social platforms in the chart below are owned by the tech giant. Although Instagram is less popular

than Facebook Messenger when it comes to membership, the social platform enjoys more visitation that the two top messaging-based services – Facebook Messenger and WhatsApp. Three-quarters of car buyers outside China are visiting or using Instagram each month, compared to 66% for Facebook Messenger and 68% for WhatsApp. The platform's visual and inspirational nature naturally lends itself to effective marketing (and to a broad audience), especially for an interest area like cars.

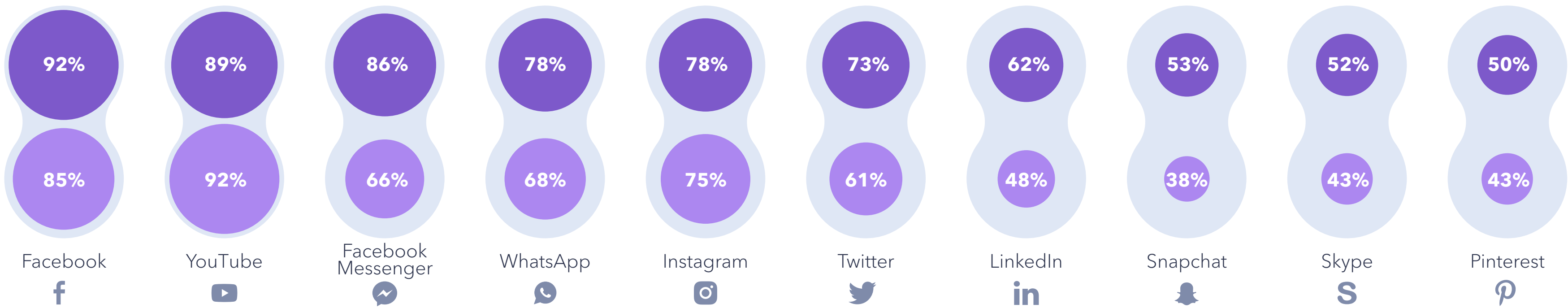
Car buyers are 32% more likely than the average YouTuber to have watched a video or ad made by a brand on YouTube in the past month

## TOP 10 SOCIAL MEDIA PLATFORMS

% of car buyers outside China who have an account on the following services/have visited the following services in the past month

- Members
- Visitors/Users

11.7  
average number  
of social media  
accounts



**Question:** On which of the following services do you have an account? | Which of the following sites / applications have you visited or used in the past month via your PC / Laptop, Mobile or Tablet?  
**Source:** GlobalWebIndex Q2 2019 **Base:** 18,371 car buyers aged 16-64 outside China

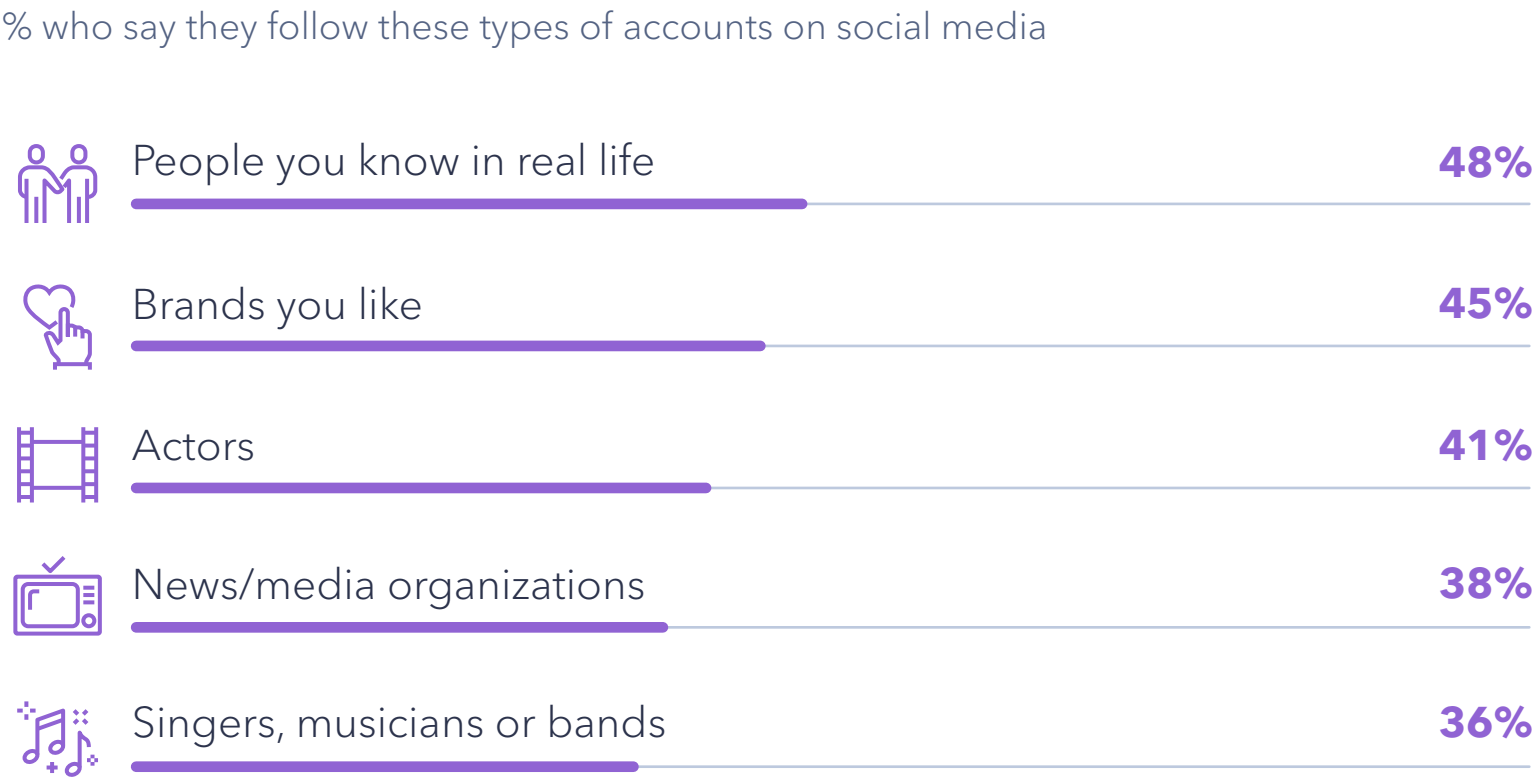


# Social Media “Following” and Habits

## TOP 5 REASONS FOR USING SOCIAL MEDIA



## TOP 5 ACCOUNTS FOLLOWED ON SOCIAL MEDIA



Despite a 14% decrease since Q2 2016, **the main reason why car buyers are on social media is to stay on top of news and current events** (42% say this). Engagement with entertaining content on these platforms has remained steady for this period, at 41%. Car buyers were actually ahead of the curve with using social media for entertainment purposes, but the rest of the online population have now caught up to this trend. Out of the top five reasons given for using social media today, **researching products is the only option that has seen an increase**, albeit a marginal one. This is also reflected in the accounts they follow on these platforms.

The fact that a higher share say they follow brands they like above all other options we track, except for people they know in real life, illustrates that **this group wants to see branded content on their newsfeeds** and actively look for products and services in this space. This is particularly pronounced

with younger demographics and females, with 49% of female car buyers following their favorite brands, compared to 41% of males. Similarly, **31% of car buyers say they follow brands they are thinking of buying from**, a behavior they are 27% more likely to do than the average internet user. The opportunity for brands to engage with present and potential consumers at this social touchpoint is therefore plain to see.

**65%** of car buyers can be classified as brand followers\* on social media

\*Brand followers are internet users who say any of the following:

- They follow brands they like on social media
- They follow brands they are thinking of buying something from on social media
- They discover products through updates on a brand’s social network page
- They have visited a brand’s social network page in the last month

If you want to know more about our social media segmentation, click [here](#).



**Question:** Who do you follow on social media? | What are your main reasons for using social media?  
**Source:** GlobalWebIndex Q2 2019 **Base:** 22,036 car buyers aged 16-64



04

Car Buyers

# Ecommerce and the Purchase Journey

# Online Shopping

Although many car buyers still adopt a multi-device approach to online shopping, there is clear indication that **the mobile dominates over other devices**. Since Q2 2017, purchasing on PC/laptop has dropped by 12 percentage points to 39% today, and purchasing on tablet saw a slight increase from 11% to 13%. But even those who are using tablets are much more likely to buy products online from their mobiles

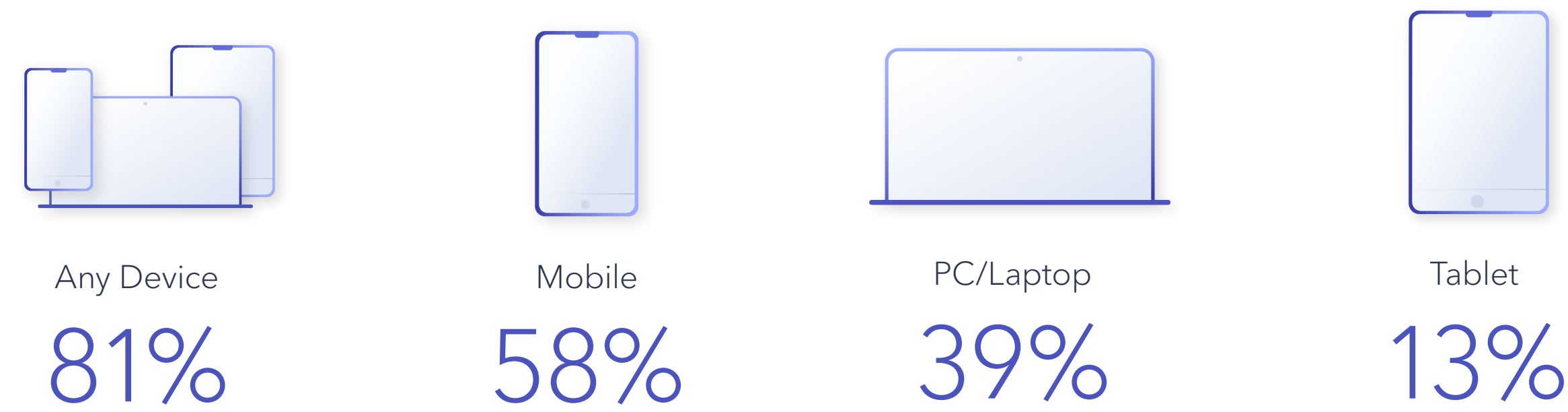
(62%) and laptops (44%) than their tablet devices (27%). There are large regional variations here, though. **Car buyers in APAC are almost exclusively committed to buying products online on mobiles** (64% do compared to 35% who shop on PCs), while those in LatAm use both devices at a similar rate (50% vs 47%). It's worth noting that although PCs are still

the preferred devices for online shopping in North America and Europe, the gap between the two devices has substantially shrunk since Q2 2017 when the disparity between the devices was much greater. Nevertheless, no one device is used in isolation in any region, so **a multi-device approach is crucial throughout the entire purchase journey**.

**37%**  
of car buyers have used a mobile payment service in the last month

## ECOMMERCE BY DEVICE

% of car buyers who have purchased a product online in the last month via the following devices



**Question:** In the past month, which of the following things have you done on the internet via any device? (Purchased a product online)  
**Source:** GlobalWebIndex Q2 2019 **Base:** 22,036 car buyers aged 16-64

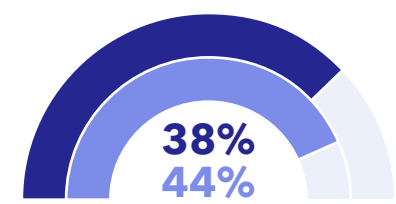


# Car Discovery

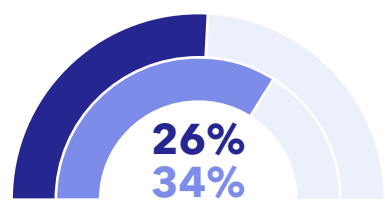
## TOP 10 CAR DISCOVERY CHANNELS

% of car buyers who have seen or heard about a car advertisement or recommendation on the following

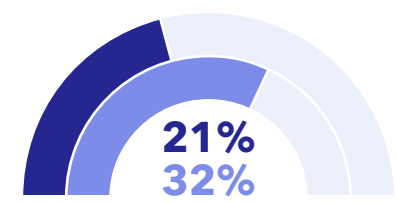
● UK ● U.S.A.



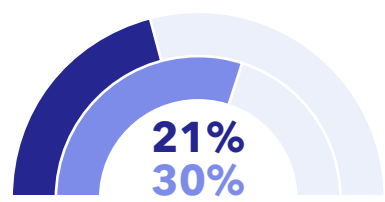
Ad seen on TV



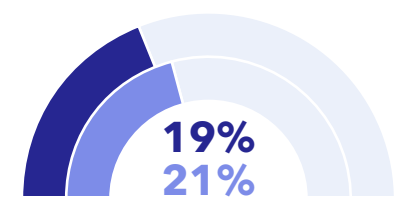
Ad seen on websites



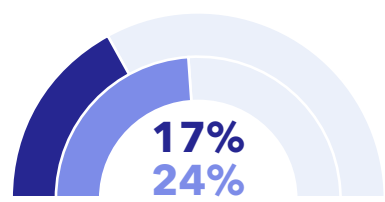
On a social media ad



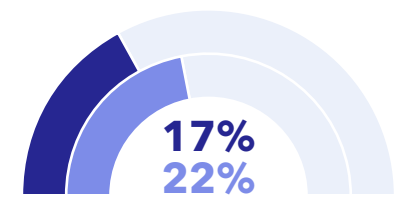
Ad seen before an online video or TV show



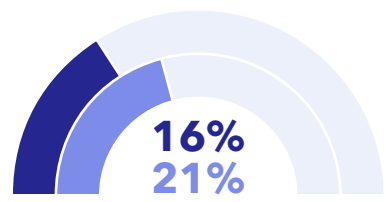
The forecourt/front of a car dealership



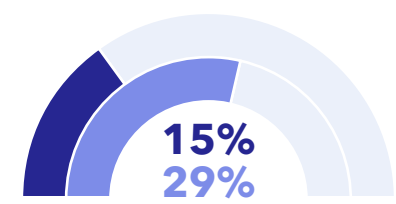
Brand/product websites



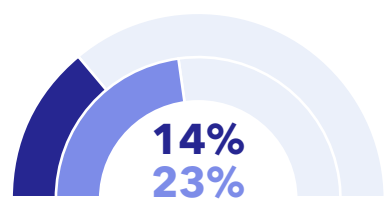
On a billboard



In a newspaper/magazine article



Word-of-mouth recommendations



Ad in magazines or newspapers

In a special survey we did in September 2019, we found that **TV ads are the most powerful source of brand discovery for car buyers in the U.S. and the UK** (43% say this). This is especially the case for those in the U.S. (44%), which is unsurprising given that car buyers here spend around 1h 13m longer than average watching TV every day.

Despite 6 in 10 car buyers globally using ad-blockers each month, **online and social media car ads are still the second and third-most prominent brand discovery channels in the U.S. and UK**. As second-screening is now a pronounced behavior among this audience, advertisers may need to continue to develop content that catches attention with second-screener in mind; that is, engaging them with personalized, compelling

and easily-processed online content in less time than a generic TV ad.

The places this audience comes across car-related content or ads also vary by age. Digital channels like **blogs and vlogs are much more influential among younger cohorts**, while traditional sources like newspaper articles work better for those aged 55-64 (Index 1.56).

## TOP OVER-INDEX BY AGE

16-24	Vlog	1.28
25-34	Blog	1.38
35-44	The forecourt/front of a car dealership	1.50
45-54	Emails or letters from companies	1.48
55-64	In a newspaper/magazine article	1.56

**46%**  
of car buyers globally have already purchased a car in the last 3-6 months

**Question:** Where have you recently seen or heard about a car advertisement/recommendation?  
**Source:** GlobalWebIndex September 2019  
**Base:** 909 (U.S.) and 779 (UK) car buyers aged 16-64

# Car Research

With a major purchase like a car, the purchase journey is a far more detailed and enduring process than for smaller purchases, meaning that resources for online research are more important, as is the ability of brands to engage with potential customers via the right channels. **Car research in the UK and the U.S. still happens equally on mobiles (70%) and PCs/laptops (69%).** Mobiles have gained more traction than the bigger screens in the UK (65% vs 60%), but the latter are holding ground in the U.S. (70%).

Once car buyers have discovered a car and start looking for more information about it, **they're most likely to go to the manufacturer's website (50% say this).** This is not the case in the UK though, where this audience is more likely to turn to a trusted peer opinion by reading consumer reviews (41%). With

TOP OVER-INDEX BY AGE

16-24	Watch video reviews	1.07
25-34	Check the manufacturer's social media pages	1.27
35-44	Read specialist magazines	1.32
45-54	Check the manufacturer's website	1.09
55-64	Browse general motoring websites	1.18

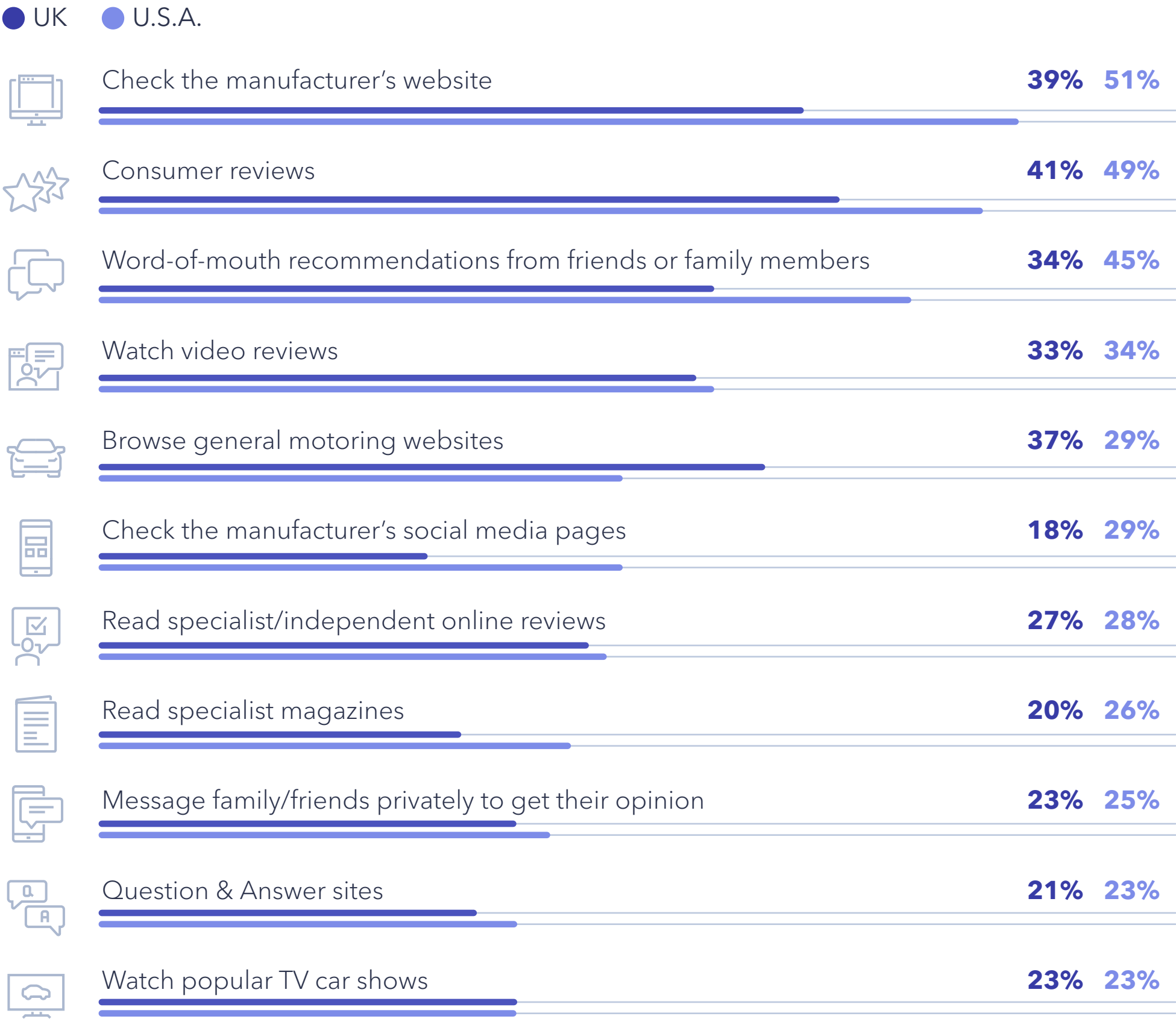
an important purchase like a car, requiring a commitment and a large expense, buyers in the UK tend to value the opinion of fellow buyers more than information from the brand itself. Positive reputation online is therefore paramount in order to move car buyers further down the path to purchase.

Generally, **car buyers in the U.S. have a more targeted and focused approach to research than their UK counterparts;** they're more likely to look for information on manufacturers' own platforms or specialist magazines. For example, 29% of car buyers in the U.S. turn to the manufacturer's social media page, compared to 18% in the UK. Social media profiles are particularly important for 25-34-year-olds (Index 1.27), while 35-44s are more likely to look for trustworthy information in specialist magazines (Index 1.32).

13%  
of car buyers globally  
have researched cars  
online before purchasing

CAR RESEARCH SOURCES

% of car buyers who find out more information about a car they're thinking of purchasing on the following



**Question:** Which of the following sources do you use to find out more information about a car you're thinking of purchasing?  
**Source:** GlobalWebIndex September 2019  
**Base:** 909 (U.S.) and 779 (UK) car buyers aged 16-64



# Point of Purchase

Although digital channels are an important part of car discovery and research, they fall somewhat short when it comes to the point of purchase. When buying a car, **most car buyers in the U.S. and UK would first and foremost consider going to a brand specific dealership** (64% say this). Making such a high-ticket purchase means that car buyers want to be able to meet experts

that can help them find a vehicle in their inventory which is perfect for their needs. Moreover, visiting a dealership gives car buyers the opportunity to test-drive different options.

Buying from an automobile sales website is still a likely outcome for 48% of this audience, being especially prominent among men

(52%). Importantly, **women are much more likely than men to go to a local multi-brand second-hand dealership** (48% vs. 39%) and to **buy from family and friends** (35% vs. 31%). This suggests that they are more practical and focused on utility than men and don't necessarily have a specific brand in mind when shopping for a vehicle. This is reflected in what influences

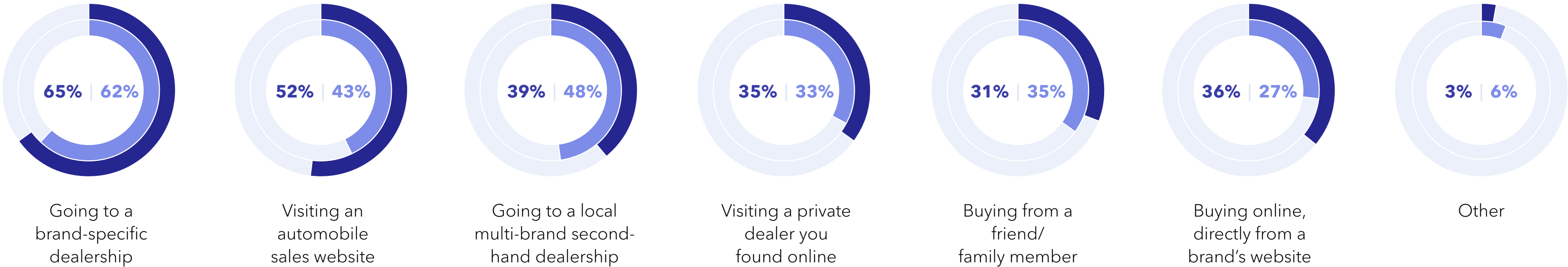
them to buy a car in the first place. Compared to men, women are more likely to want **value for money** (76% vs. 71%), **safety** (67% vs. 58%) and **a suitable size for their needs** (64% vs. 51%). Other features like the look of the car, the brand name and whether the car is environmentally efficient carry more weight among men.

When buying a car, value for money, safety and the size of the vehicle matter more to women than men

## POINT OF PURCHASE

% of car buyers in the U.S. and UK who would consider the following when buying a car

- Male
- Female



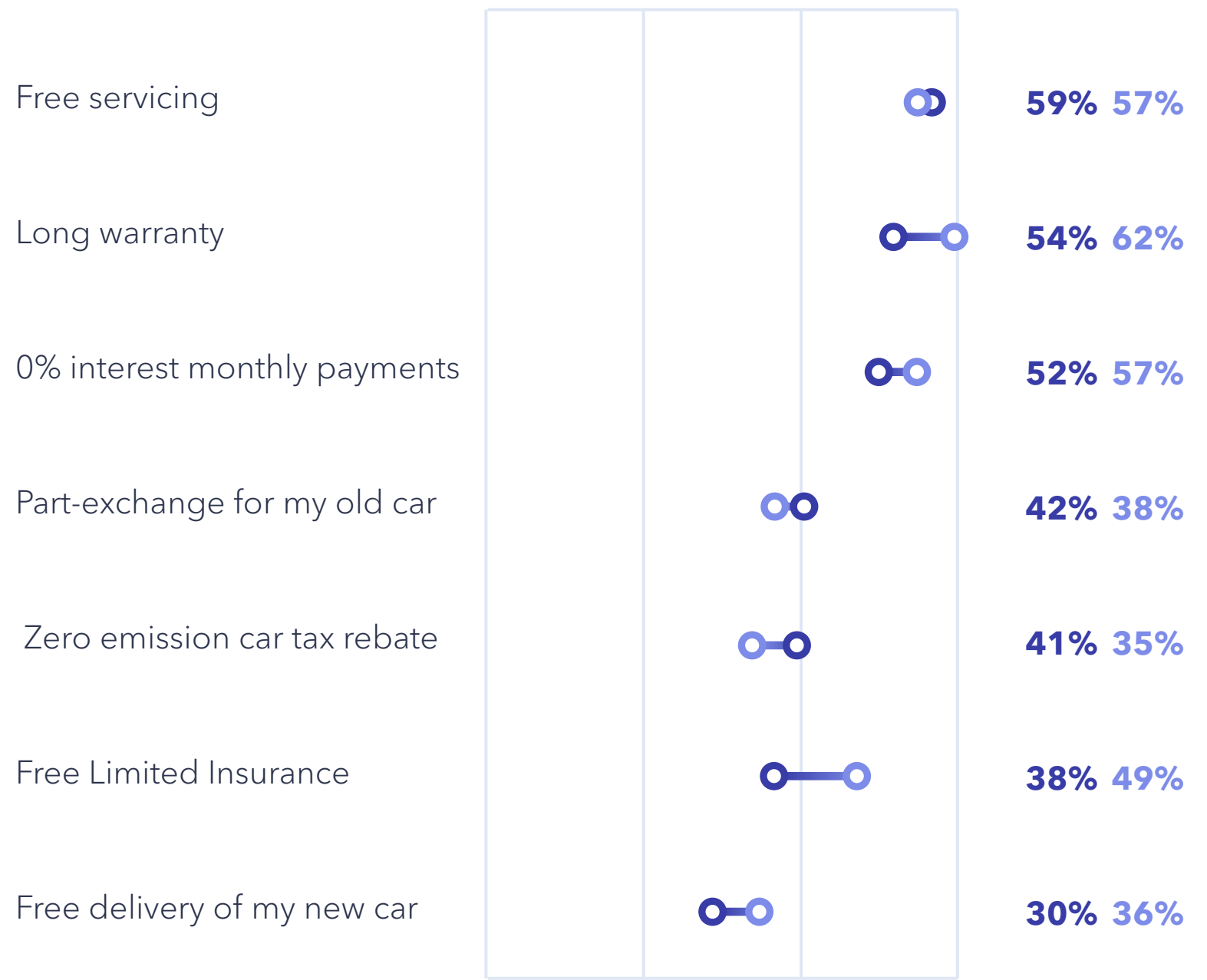
**Question:** When buying a car, which of the following would you consider?  
**Source:** GlobalWebIndex September 2019  
**Base:** 909 (U.S.) and 779 (UK) car buyers aged 16-64

# Point of Purchase

## CAR PURCHASE DRIVERS

% of car buyers who would be motivated to complete their next car purchase by the following

UK U.S.A.



Looking at their motivations to complete the purchase online, **free servicing has the biggest influence on car buyers’ purchase decisions in the UK** (59% say this), while **long warranty is most important in the U.S.** (62%). Given the high price tags of cars, financial incentives like 0% interest finance options are also vital to entice car buyers to purchase; **this offering is as important as free servicing in the U.S.** (57%) and it’s especially appealing to women (60%). Incentives differ by age too. Younger buyers aged 16-24 are more likely to be incentivized by free delivery of the new car (38% say this), while 55-64s prefer free servicing (68%).

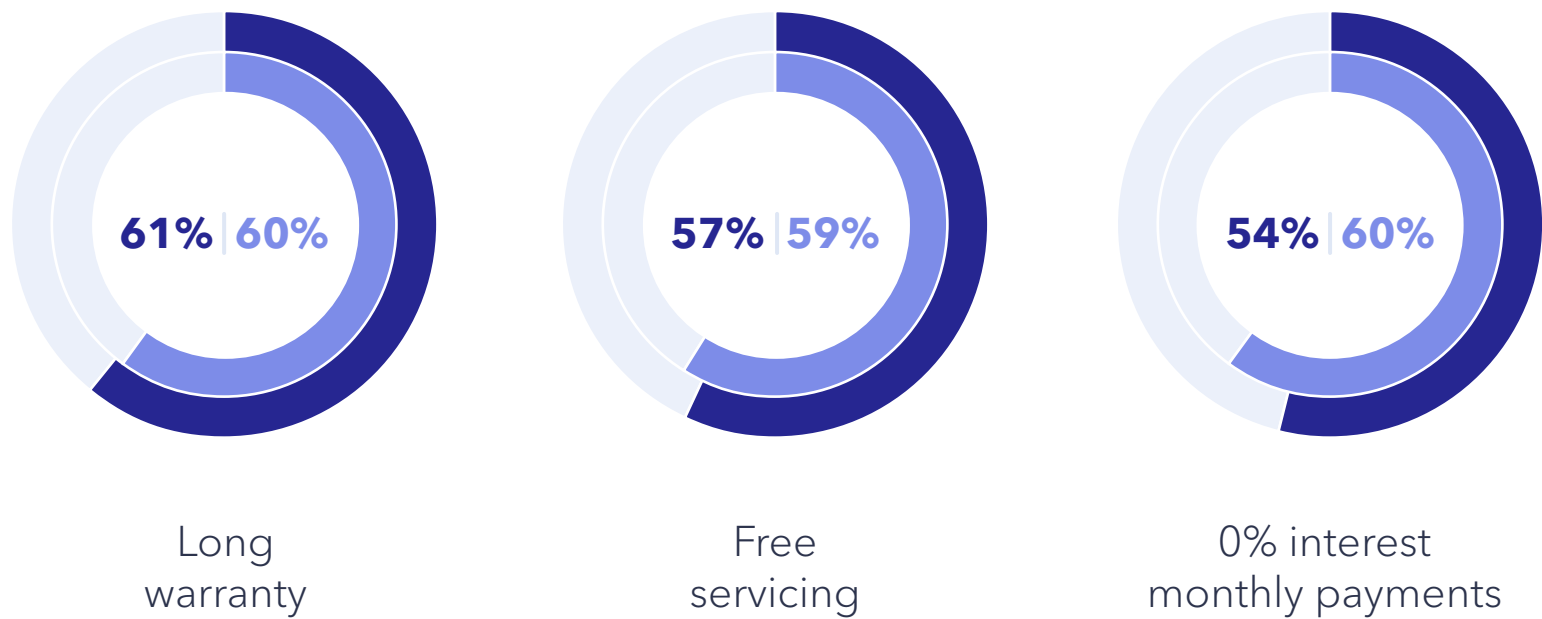
With the recent proliferation of regulations on fuel emissions in the UK, it’s not surprising that **41% of car buyers here would like a tax rebate for buying a zero emission car.** When we asked

them about what features they’d like to see in affordable future cars, **environmentally-friendly energy sources like electric or hybrid energy powering the car emerged as the single most prominent feature among car buyers in the UK** (64%). Later in the report, we discuss the ramifications of this on the industry.

## TOP 3 PURCHASE DRIVERS BY GENDER

% of car buyers who would be motivated to complete their next car purchase by the following

Men Women



**Question:** Which of the following incentives would motivate you to complete your next car purchase?  
**Source:** GlobalWebIndex September 2019  
**Base:** 909 (U.S.) and 779 (UK) car buyers aged 16-64



# Turning Car Buyers into Advocates

The importance that car buyers place on consumer reviews throughout the purchase journey emphasizes that **a brand’s positive reputation in the automotive industry is paramount for driving sales**. So how can companies ensure that this audience speaks positively about their products?

**High-quality products are most likely to encourage car buyers to be brand advocates.** This remains the most popular motivation across all major demographic breaks and it’s especially impactful among 55-64s. Financial rewards score highly too at 40%, dropping slightly to 38% among those in the top 25% income bracket. Generally, younger car buyers seem to be more emotionally connected to brands than older consumers, whose incentives are more practical. The former are more likely to promote a brand online out

of simple love, while receiving great customer service matters more to the latter.

The brands that car buyers advocate to others the most are **Toyota (7%), Honda (7%) and Volkswagen (5%)**, but this varies strongly by region. Honda is most promoted by this audience in APAC (8%), Toyota in MEA (14%) and North America (11%), Volkswagen in Europe (7%) and Chevrolet in LatAm (14%).

**Car buyers are 34% more likely than average to have posted a review of a product/company online in the past month**

## BRAND ADVOCACY MOTIVATIONS

% of global car buyers who would be motivated by the following to promote their favorite brand online



**Question:** What would most motivate you to promote your favorite brand online?  
**Source:** GlobalWebIndex Q2 2019 **Base:** 22,036 car buyers aged 16-64



• TREND IN ACTION •

## Gen Z Keeping Car Manufacturers on Their Toes



Cars, once a symbol of freedom and independence in the West, are now linked with realities such as climate change and are often seen as an unnecessary expense by younger consumers. With companies like Uber laying the foundations for car-sharing, it's possible that many Gen Zs may decide that entering the car market isn't worth it.

Various brands are taking action to ensure this doesn't happen by reaching out to younger audiences. The Mini's "#MINIonDemand" Twitter **campaign** offers quick and easy test drives in exchange for user-generated content (Tweets), which Gen Zs are particularly receptive to.

Others are looking to transform perceptions of cars by focusing on the thrill of driving. Acura's "Less Talk, More Drive" **campaign** conveys the excitement of being behind the wheel, shown through the eyes of mechanics and race car drivers; and Chevrolet's "A Little Bit Country, A Little Bit Rock 'n Roll" captures the **freedom and empowerment** associated with driving by showing pickup trucks speeding through various landscapes, from country roads to race car tracks.

Gen Z will make up **40%** of the consumer market by 2020. Manufacturers are therefore rising to the challenge of drawing these consumers into the car market by breathing new life and meaning into the act of driving. Only time will tell if they're doing enough.



05

Car Buyers

# **Outlook on the Automotive Industry**

# The Auto Industry as We Know it is in Trouble

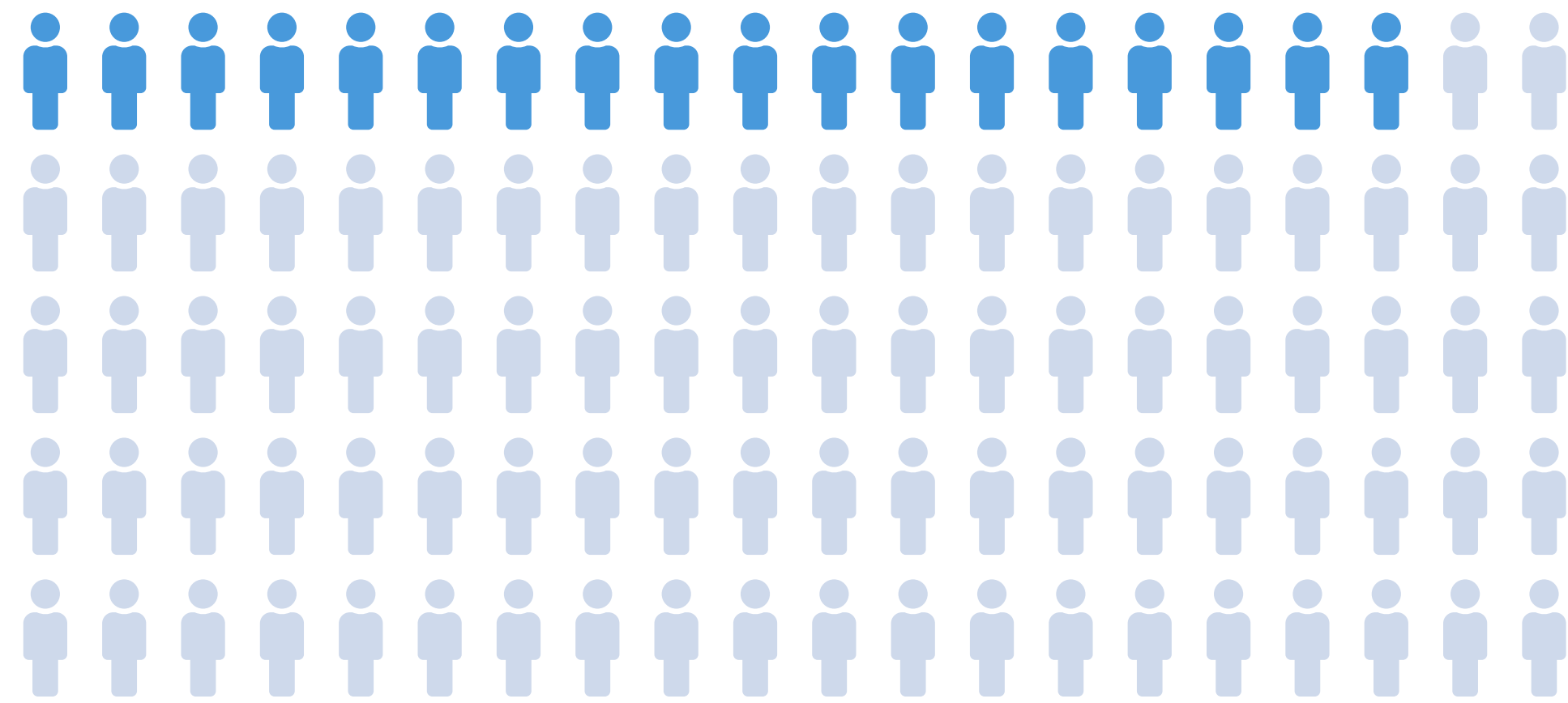
It's not a secret that the automotive industry is facing a demand crisis. Car sales are dropping all over the world, with the **UK** showing a 36% year-on-year decline in total annual registrations, while August 2019 marked the 14th consecutive decline for the market in **China**. **India** has also registered losses with a 19% year-on-year fall in July 2019, described as "the worst ever in nearly 19 years". Why is that, and how are stakeholders responding?

- New **regulations** imposing stricter fuel emission standards have just been passed in the EU in efforts to meet climate change targets. This means that vehicle manufacturers will be taxed for excess emissions, and many car manufacturers are pulling out new models from production as a result. On top of that, in some cities like London there are additional costs for car owners that make driving diesel/petrol cars more expensive (e.g. a daily ULEZ charge of £12.50).

- Car owners are holding their vehicles for longer, making replacing them harder. A bespoke study we conducted in December 2018 showed that 15% of internet users in the UK and the U.S. last purchased a car 5+ years ago. Of these, only 22% plan to purchase again in the next year, while 29% said they don't plan to purchase a car at all. The cost of new cars is also a factor. New cars' prices in the U.S. have **risen** by 29% since 2009, compared to only a 6% rise in household income over the same period.
- Though still a market too small to impact the whole sector, **electric vehicles** are becoming more popular and more in demand because they bypass environmental issues and conform to new regulations. However, they are not being produced at a fast-enough rate. At least for now, the supply is struggling to meet the demand.

- Consumer and business confidence has been affected by underlying economic and political instability in the UK. As a result, some of the biggest car manufacturers are **stopping** operations in the country, which ultimately limits the supply of new cars and also raises the cost of importing from overseas.

**18%**  
of car upgraders in the U.S. and UK  
want to get a car with a less harmful  
impact on the environment

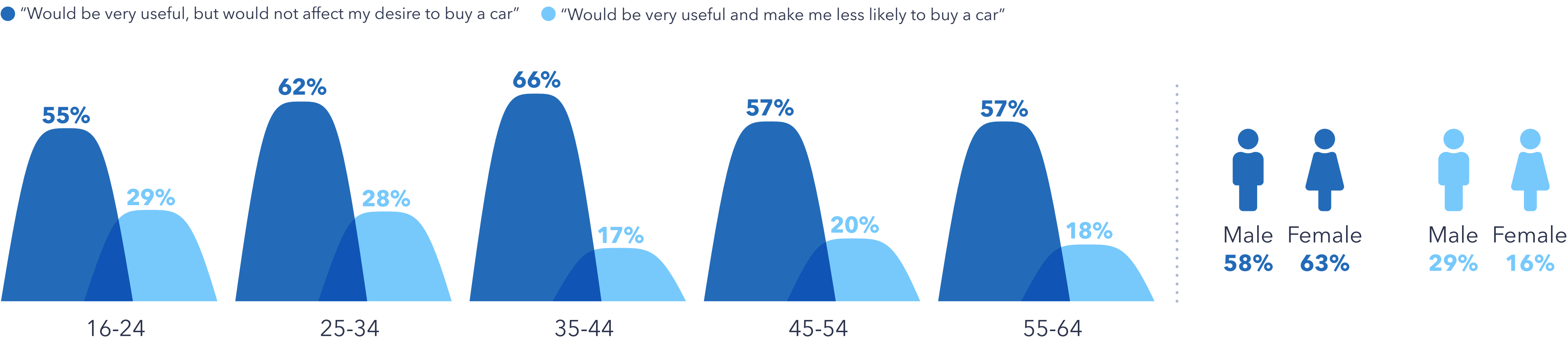


**Question:** For what reasons are you thinking of buying a new car?  
**Source:** GlobalWebIndex September 2019  
**Base:** 781 (U.S.) and 607 (UK) car upgraders aged 16-64



“In the future, rather than having to locate, book, and pay for each mode of transportation separately, we will be able to plan and book door-to-door trips using a single app. This is what people are calling “Mobility-as-a-Service”.

Complete the sentence, “A service like this...



**Question:** Complete the sentence, “Mobility-as-a-service...”  
**Source:** GlobalWebIndex September 2019  
**Base:** 909 (U.S.) and 779 (UK) car buyers aged 16-64

# The Answer: Focus on Mobility, Not Cars

Many have already realized that private car ownership is unlikely to sustain company revenues in the long run. Similar to other industries, the automotive landscape is clearly shifting from ownership to on-demand services. Mobility-as-a-service (MaaS) is about building digital platforms that let users connect different types of transport easily, often across a single interface, and allowing them to locate, book, and pay for transport within the platform's ecosystem.

Our data shows that **83% of car buyers in the U.S. and UK think this would be very useful, but 23% equally think this service will make them less likely to buy a car.** Mobility-as-a-service would most affect the private car ownership market for younger buyers and men, while women and older consumers are more likely to still be inclined to purchase.

The growing consumer familiarity with on-demand products like online streaming services is also fueling this trend. The success of Netflix, for example, lies in its ability to leverage consumer data to inform its offerings and personalize the customer experience. The likes of Citymapper and Uber already have enough data to provide transport solutions of their own and are jumping on the bandwagon. **Uber** is testing a subscription pass in the U.S. which costs \$24.99 a month and combines rides, Eats, bikes and scooters, while **Citymapper** announced it's launching a similar service in London.

In response to the emerging MaaS trend, car manufacturers that are looking to stay ahead of the game are investing in innovative mobility solutions. Mitsubishi Corp. and Toyota Financial Services have both **invested** in Finnish app

"Whim", which provides a connected transport ecosystem of buses, city bikes, ride-sharing and taxis to rental cars. Meanwhile, ride-hailing company "Ola" is **piloting** a self-drive car rental service in India. Ola is planning to partner with manufacturers like Audi and BMW and feature luxury cars in its fleet as part of its rental, subscription or corporate leasing offerings.

**Car buyers are 26% more likely than average to say they'd rather sign up for a membership to a product/service than pay extra to own it (57% say this)**



# Notes on Methodology

All figures in this report are drawn from **GlobalWebIndex’s online research among internet users aged 16-64**. Please note that we only interview respondents aged 16-64 and our figures are representative of the **online** populations of each market, not its total population.

### OUR RESEARCH

Each year, GlobalWebIndex interviews over 575,000 internet users aged 16-64 across 45 markets. Respondents complete an **online questionnaire** that asks them a wide range of questions about their lives, lifestyles and digital behaviors. **We source these respondents in partnership with a number of industry-leading panel providers**. Each respondent who takes a GWI survey is assigned a unique and persistent identifier regardless of the site/panel to which they belong and **no respondent can participate in our survey more than once a year** (with the exception of internet users in Egypt, Saudi Arabia, and the UAE, where respondents are allowed to complete the survey at 6-month intervals).

### OUR QUOTAS

To ensure that **our research is reflective of the online population in each market**, we set appropriate **quotas on age, gender, and education** – meaning that we interview representative numbers of men vs women, of 16-24s, 25-34s, 35-44s, 45-54s and 55-64s, and of people with secondary vs tertiary education.

To do this, we conduct research across a range of international and national sources, including the World Bank, the ITU, the International Labour Organization, the CIA Factbook, Eurostat, the US Bureau of Labor Statistics as well as a range of national statistics sources, government departments and other credible and robust third-party sources. This research is also used to calculate the ‘weight’ of each respondent; that is, approximately how many people (of the same gender, age, and educational attainment) are represented by their responses.

### MOBILE SURVEY RESPONDENTS

**From Q1 2017 on, GlobalWebIndex has offered our Core survey on mobile.** This allows us to survey internet users who prefer using a mobile or are mobile-only (who use a mobile to get online but do not use or own any other device). Mobile respondents complete a shorter version of our Core survey, answering 50 questions, all carefully adapted to be compatible with mobile screens.

**Please note that the sample sizes presented in the charts throughout this report may differ** as some will include both mobile and PC/laptop/tablet respondents and others will include **only** respondents who completed GWI’s Core survey via PC/laptop/tablet. For more details on our methodology for mobile surveys and the questions asked to mobile respondents, please download this [document](#).

### GLOBALWEBINDEX SAMPLE SIZE BY MARKET

This report draws insights from **GlobalWebIndex’s Q2 2019** wave of research across 45 countries, with a global sample of 139,658 respondents.

	ALL INTERNET USERS	CAR BUYERS		ALL INTERNET USERS	CAR BUYERS
Argentina	1,565	245	Netherlands	1,311	132
Australia	4,056	532	New Zealand	1,298	136
Austria	1,291	127	Nigeria	958	0
Belgium	1,282	108	Philippines	1,627	333
Brazil	2,355	493	Poland	1,875	348
Canada	2,301	324	Portugal	1,288	166
China	15,215	3,665	Romania	1,309	249
Colombia	1,330	221	Russia	2,273	202
Denmark	1,257	118	Saudi Arabia	1,537	256
Egypt	1,788	331	Singapore	2,714	296
France	5,152	633	South Africa	1,548	300
Germany	5,176	704	South Korea	1,278	150
Ghana	847	0	Spain	5,114	843
Hong Kong	1,813	159	Sweden	1,314	146
India	7,594	2,061	Switzerland	1,291	122
Indonesia	1,855	417	Taiwan	1,783	190
Ireland	1,269	164	Thailand	1,570	374
Italy	5,363	981	Turkey	1,536	301
Japan	1,877	121	UAE	1,804	431
Kenya	958	0	UK	10,146	1,291
Malaysia	1,533	282	USA	25,037	3,316
Mexico	2,619	521	Vietnam	1,604	247
Morocco	947	0			

# Notes on Methodology

## INTERNET PENETRATION RATES ACROSS GLOBALWEBINDEX’S MARKETS

GlobalWebIndex’s research focuses exclusively on the internet population and because internet penetration rates can vary significantly between countries (from a high of 90%+ in parts of Europe to lows of c.20% in parts of APAC), the nature of our samples is impacted accordingly.

Where a market has a high internet penetration rate, its online population will be relatively similar to its total population and hence we will see good representation across all age, gender and education breaks. This is typically the case across North America, Western Europe and parts of Asia Pacific such as Japan, Australia and New Zealand. Where a market has a medium to low internet penetration, its online population can be very different to its total population; broadly speaking, the **lower the country’s overall internet penetration rate, the more likely it is that its internet users will be young, urban, affluent and educated**. This is the case throughout much of LatAm, MEA and Asia Pacific.

This table provides GlobalWebIndex forecasts on internet penetration (defined as the number of internet users per 100 people) in 2019. This forecasted data is based upon the latest internet penetration estimates from the International Telecommunication Union (ITU) for each market that GlobalWebIndex conducts online research in.

## GLOBALWEBINDEX VERSUS ITU FIGURES

As GlobalWebIndex’s Core Research is conducted among 16-64 year-olds, we supplement the internet penetration forecasts for a country’s total population (reproduced above) with internet penetration forecasts for 16-64s specifically. Forecasts for 16-64s will be higher than our forecasts for total population, since 16-64s are the most likely age groups to be using the internet.

## MOBILE SURVEY RESPONDENTS

From Q1 2017 on, GlobalWebIndex has offered our Core survey on mobile. This allows us to survey internet users who prefer using a mobile or are mobile-only (who use a mobile to get online but do not use or own any other device). Mobile respondents complete a shorter version of our Core survey, answering 50 questions, all carefully adapted to be compatible with mobile screens.

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## INTERNET PENETRATION RATES

Table below refers to the total population in each market

Argentina	78%	Netherlands	93%
Australia	88%	New Zealand	93%
Austria	88%	Nigeria	36%
Belgium	89%	Philippines	64%
Brazil	71%	Poland	79%
Canada	94%	Portugal	78%
China	59%	Romania	72%
Colombia	66%	Russia	80%
Denmark	97%	Saudi Arabia	83%
Egypt	54%	Singapore	85%
France	85%	South Africa	62%
Germany	88%	South Korea	95%
Ghana	48%	Spain	87%
Hong Kong	91%	Sweden	96%
India	42%	Switzerland	96%
Indonesia	39%	Taiwan	83%
Ireland	87%	Thailand	58%
Italy	62%	Turkey	71%
Japan	92%	UAE	95%
Kenya	43%	UK	96%
Malaysia	83%	USA	80%
Mexico	69%	Vietnam	55%
Morocco	69%		

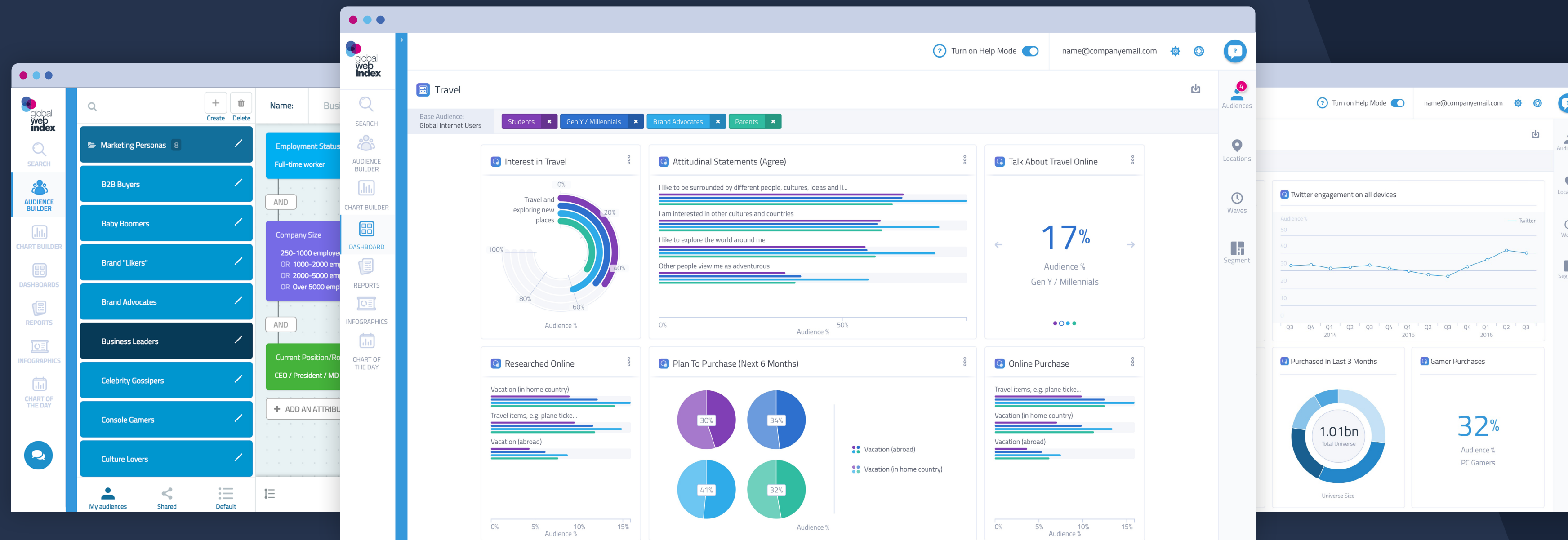




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