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Global Automotive Study

A Look at the Role of the Internet in the Automotive Shopping & Purchasing Process Around the World

Google/NetPop November 2009

We set out to learn...

What does auto shopping look like around the world?

17 countries16,827 vehicle purchasers1 consistent survey



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Methodology

- Research was conducted among new and used car buyers in 17 countries who had purchased a new vehicle within the last 12 months.
- From a representative sample of the Internet population in each market based on age and gender, 16,827 people, age 18 or older were drawn from market research panels to complete a survey online.
- Approximately 1000 interviews were completed in each country distributed across the following quotas:

	New Car Buyers	Used Car Buyers	TOTAL	Interview Dates (day.month)
Argentina	500	502	1002	04.04 - 24.04
Australia	501	510	1011	13.04 - 07.05
Brazil	500	508	1008	17.03 - 31.03
China	501	504	1005	21.05 - 06.06
France	500	507	1007	27.07 - 03.08
Germany	500	508	1008	22.07 - 30.07
India	509	500	1009	06.05-20.05
Italy	506	500	1006	22.07 - 03.08
Japan	501	500	1001	03.06 - 01.06
Mexico	500	510	1010	04.04 - 26.04
Netherlands	500	510	1010	22.07 - 05.07
New Zealand	307	405	712	24.04 - 16.05
Poland	500	506	1006	17.09 - 05.10
Russia	508	501	1009	22.07-30.07
Spain	503	503	1006	23.07 - 04.08
United Kingdom	500	511	1011	21.07 - 30.07
United States	501	505	1006	17.03 - 21.03
Total	8337	8490	16,827	17.03 - 05.10

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Country Segmentation

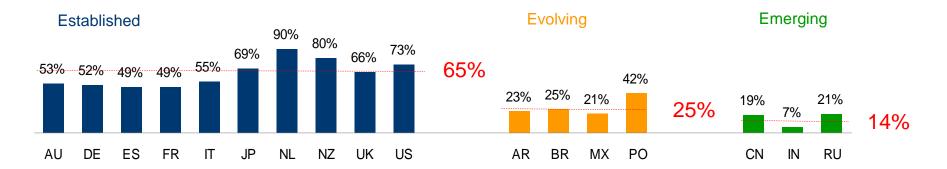
Vehicles Sold per Capita



Internet Penetration Rates

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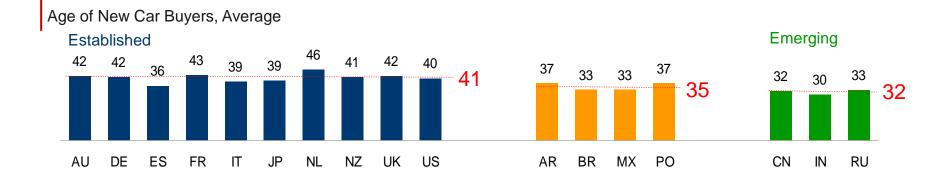
Areas of Investigation

1	Demographics
2	Start of Research
3	Shopping
	Online & Traditional Resources
	Search
	Online Video
	User Generated Content
4	Recommendations



Demographics

Age & Hours Online



Hours Online, Weekday Average

with Google



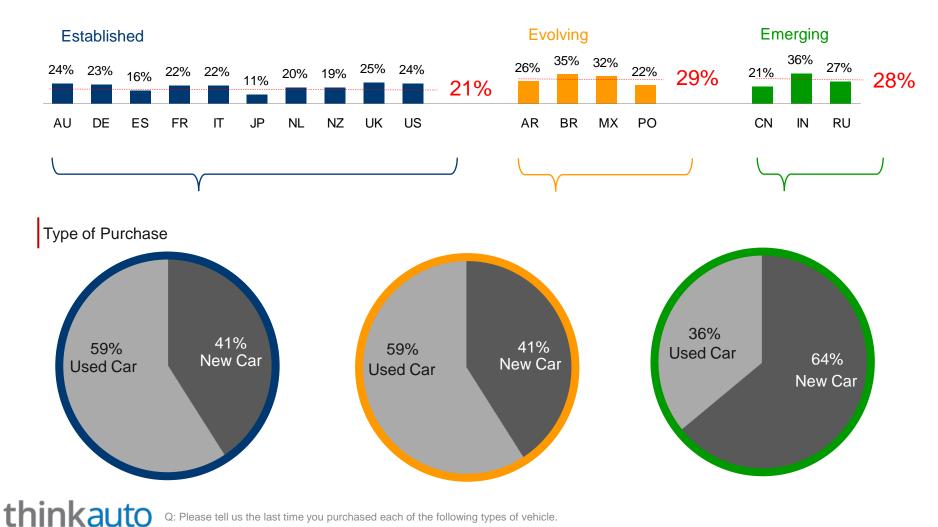
Base: New car purchasers, prior to quota-sampling

thinkauto Q: On average, how many hours per weekday do you spend on the Internet? | Please indicate your age.

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Purchase





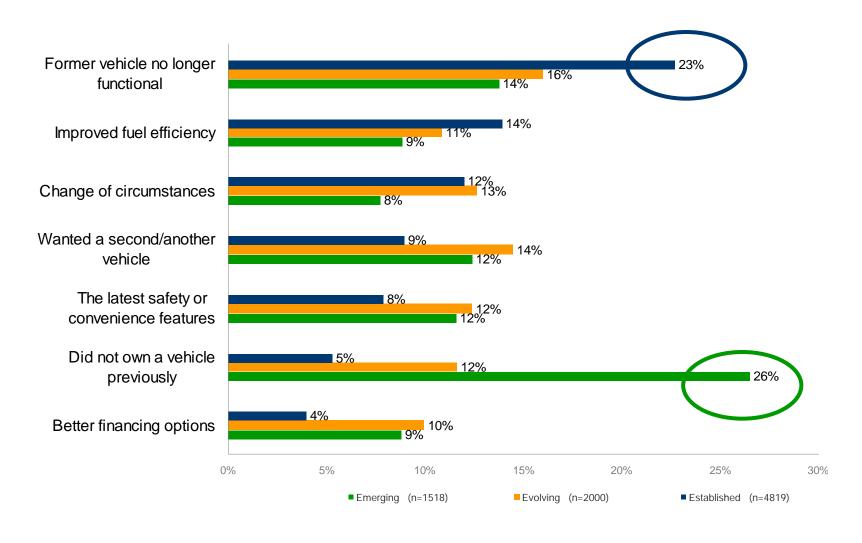
Q: Please tell us the last time you purchased each of the following types of vehicle.

Source: 2009 Google/Netpop Global Auto Study



Start of Research

Purchase Triggers



Base: New car purchasers

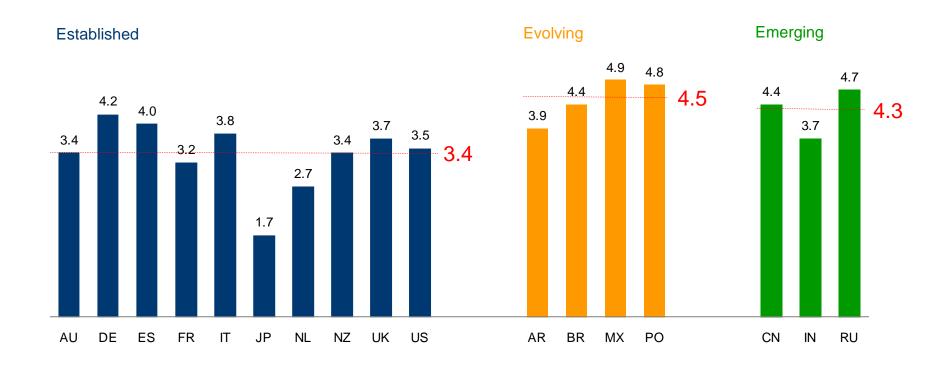
Q: What was the main trigger for the purchase of your vehicle?

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Source: 2009 Google/Netpop Global Auto Study

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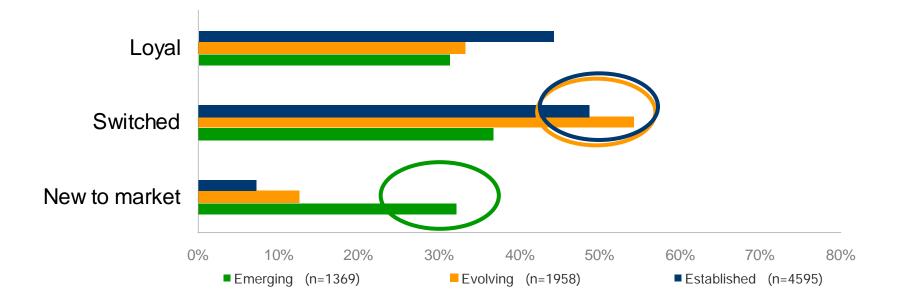
Number of Considered Brands



Base: New car buyers

c: When you first started your research, which vehicle makes were you considering?





Base: New car buyers

Note: Excludes those who could not indicate a previously-purchased brand

thinkauto Q: Which of these statements best describes the vehicle you purchased? | What was the make or brand of your previous vehicle? | What was the make/brand of the vehicle that you purchased?

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Source: 2009 Google/Netpop Global Auto Study

Length of Shopping Process



Base: Purchased new car

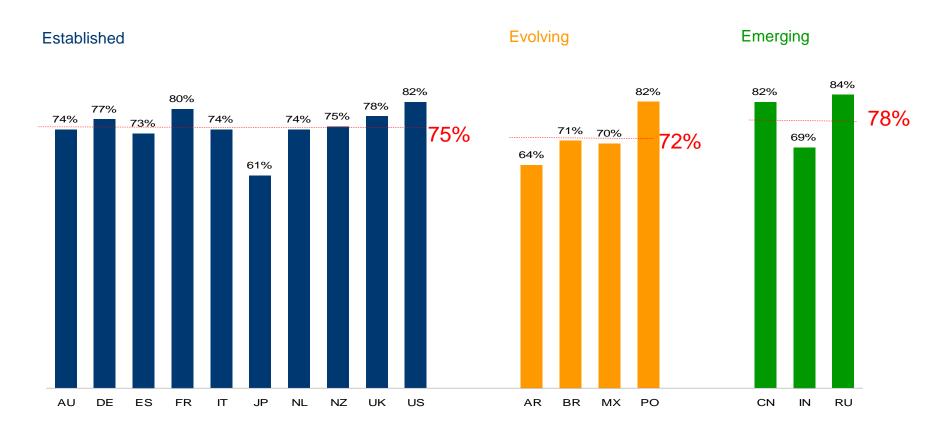


Q: In which month did you start thinking about purchasing the vehicle? | In which month did you actually make the purchase? | Approximately how much time did you spend actively researching vehicles from the time you first started to look into a vehicle to the time you purchased it?



Online & Traditional Sources

Internet Use for Auto Research

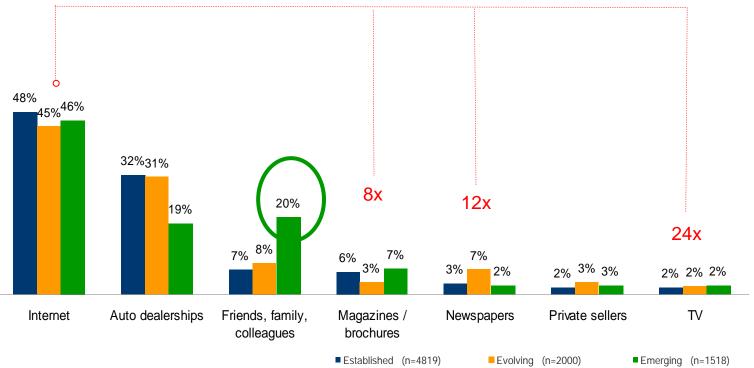


Base: New car buyers



Q: As you started to research your vehicle purchase, where was the first place where you began searching for information? Please select any additional places where you looked at any stage in researching your vehicle purchase. Google Confidential and Proprietary 16

First Source for Research



Global Average (47%) : Internet versus Traditional Sources

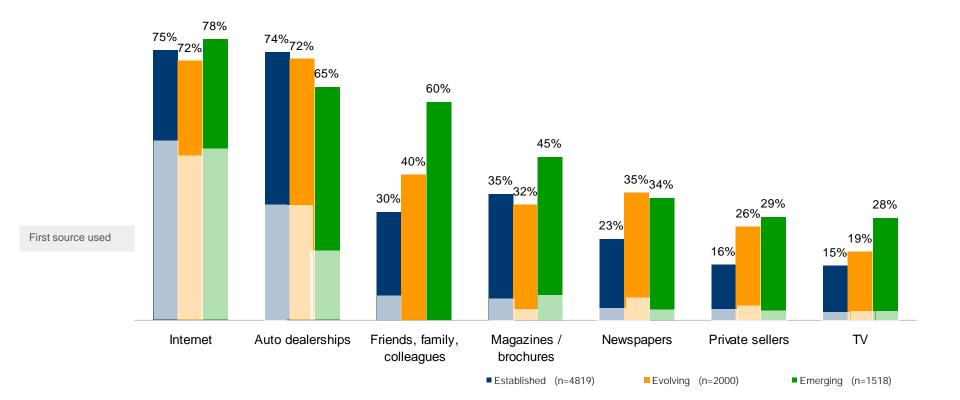
Base: New car buyers

thinkauto Q: As you started to research your vehicle purchase, where was the first place you began searching for information?

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Source: 2009 Google/Netpop Global Auto Study

Sources Used Throughout Research



Base: New car buyers

thinkauto Q: Please select any additional places you looked at any stage in researching your vehicle purchase.

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Source: 2009 Google/Netpop Global Auto Study

Resources Across Research Timeline

Impact of Channels on the Purchase Decision Process (Global Average) 100% ΓV / Print 90% Other sellers riends/family 80% Dealerships Online sources 70% 60% 50% 40% 30% 20% 10% Beginning of Research End of Research Influenced selection of options Modified choice of model Modified choice of dealer Aided discovery of new makes Helpedinformdecision Modified choice of make Continued initial choice Influenced budget Promoted Purchase merest Base: New car buyers thinkauto

nnel of influence from online sources, dealerships, friends & family, and TV, newspapers, magazines and other media, Q Google Confidential and Proprietary 19 that was most influential for:

Source: 2009 Google/Netpop Global Auto Study

Use of Manufacturer Sites



with Google

Base: New car buyers who used manufacturer sites

Q: Which of the following activities did you do on manufacturer sites?

Use of Manufacturer Sites

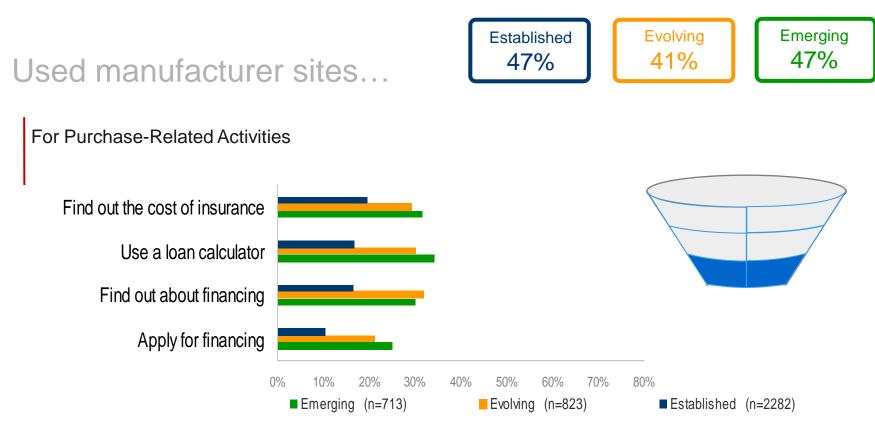


Base: New car buyers who used manufacturer sites

with Google

Q: Which of the following activities did you do on manufacturer sites?

Use of Manufacturer Sites



Base: New car buyers who used manufacturer sites

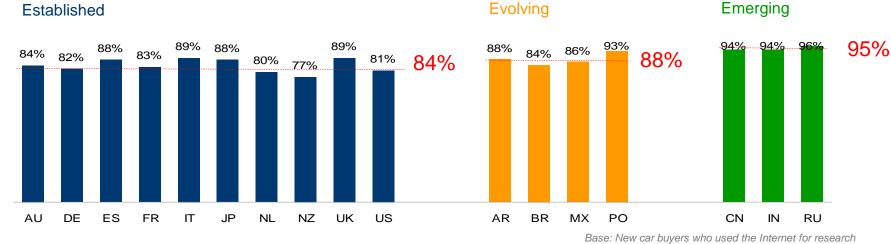
with Google.

Q: Which of the following activities did you do on manufacturer sites?



Search Engines

Use & Importance of Search



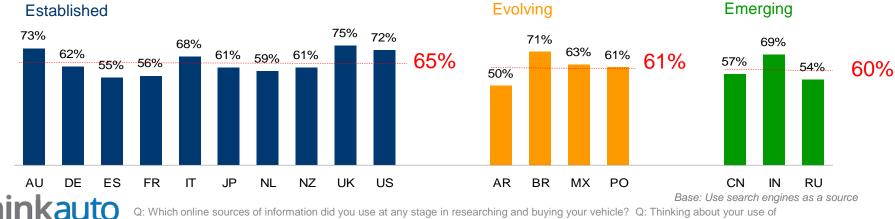
Use of Search as a Source or Gateway

Established

Importance of Search

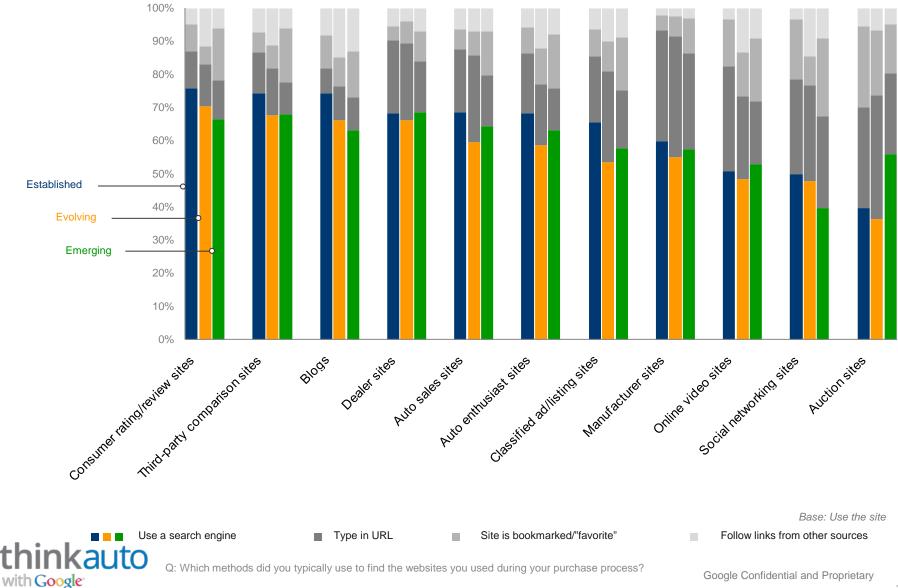
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Top 2 box scores (4 or 5 on 5-pt. "important" scale)

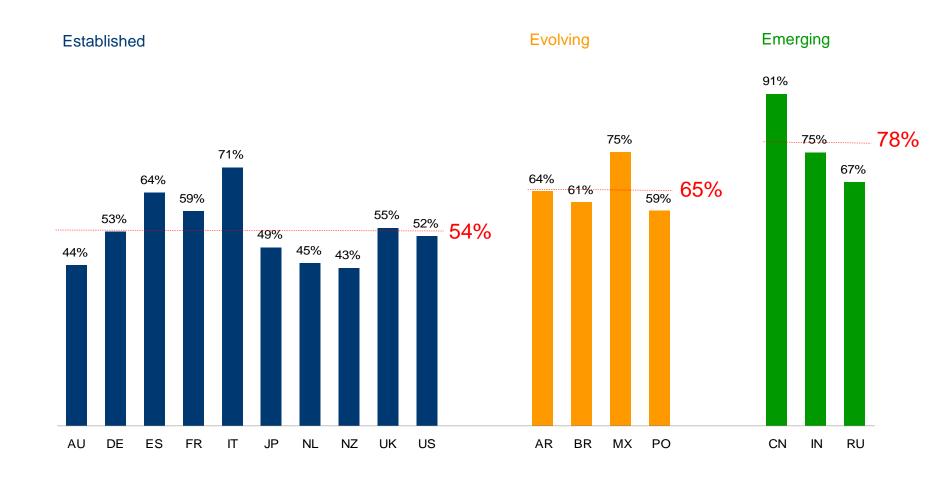


Q: Which online sources of information did you use at any stage in researching and buying your vehicle? Q: Thinking about your use of each source in the overall process, how would you rate its importance where 1 is not at all important and 5 is extremely in the overall process, how would you rate its importance where 1 is not at all important and 5 is extremely in the overall process.

Navigation to Automotive Sites



Online Automotive Video Viewership



Base: New car buyers who use the internet for car research

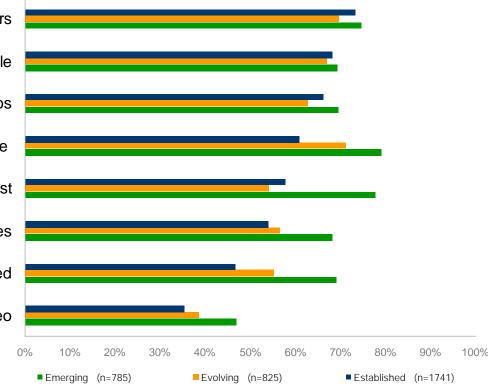
thinkauto Q: Which online sources of information did you use at any stage in researching and buying your vehicle?

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Source: 2009 Google/Netpop Global Auto Study

Benefits of Online Automotive Video

Convenient way to get information on cars Videos on my car of interest were readily available I'm satisfied with the quality of the videos I wish there were more online videos available Videos increased my interest Videos helped narrow down choices Videos introduced me to cars I hadn't considered I first heard about a car from a video



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

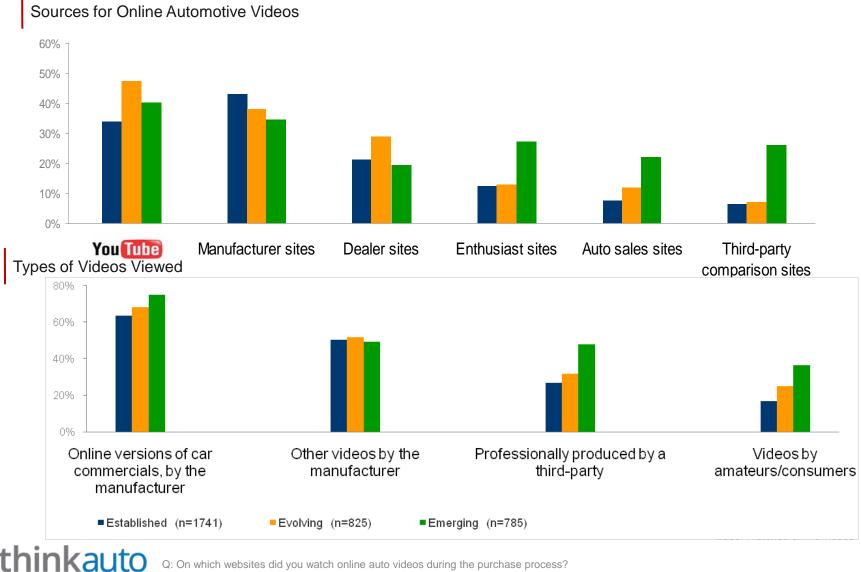
Base: New car buyers who watched videos



Q: You stated that you used online auto videos when researching and buying your vehicle. Please read each statement and indicate to what extent you agree /disagree.

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Online Automotive Videos – Sources & Types



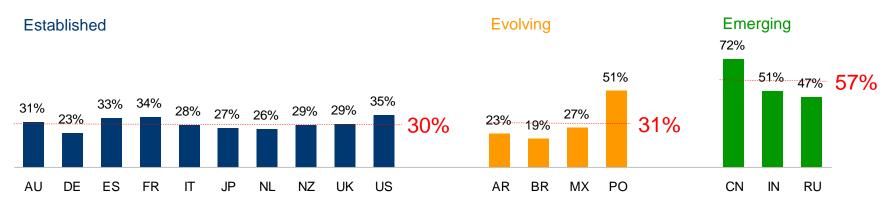
Source: 2009 Google/Netpop Global Auto Study



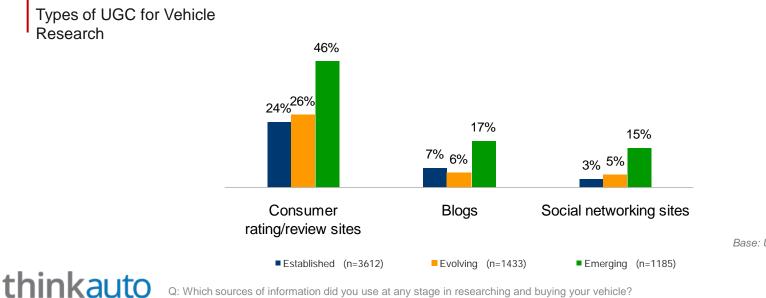
User Generated Content

Reliance on Peer Information

Use of UGC for Vehicle Research



Base: New car buyers who use the internet for car research

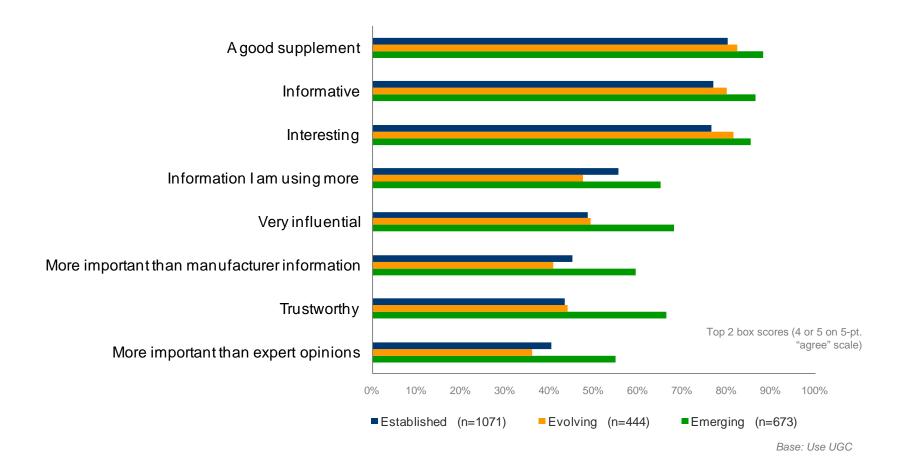


Base: Use the internet for research

Source: 2009 Google/Netpop Global Auto Study

Car Buyer Opinions on UGC

When researching a vehicle purchase, user-generated content is...



thinkauto Q: How much do you agree or disagree with each of the following statements about your experience with "user-generated content" during the auto purchase proces Google Confidential and Proprietary

Source: 2009 Google/Netpop Global Auto Study

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