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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 countries  
16,827 vehicle purchasers  
1 consistent survey



# Methodology

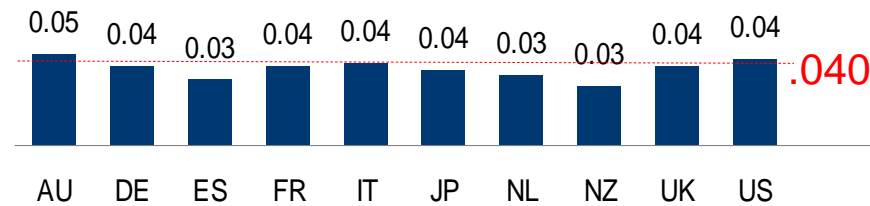
- Research was conducted among new and used car buyers in 17 countries who had purchased a new vehicle within the last 12 months.
- From a representative sample of the Internet population in each market based on age and gender, 16,827 people, age 18 or older were drawn from market research panels to 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
<b>Total</b>	<b>8337</b>	<b>8490</b>	<b>16,827</b>	<b>17.03 – 05.10</b>

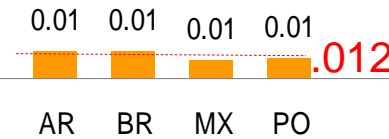
# Country Segmentation

## Vehicles Sold per Capita

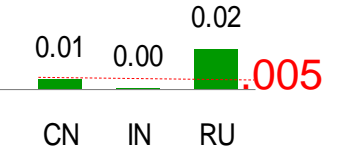
### Established



### Evolving

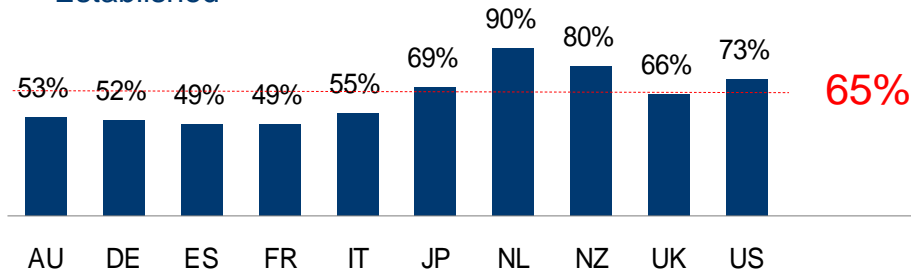


### Emerging

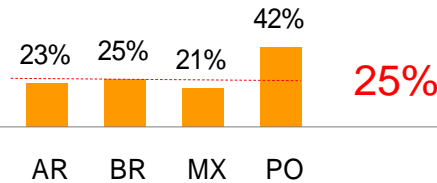


## Internet Penetration Rates

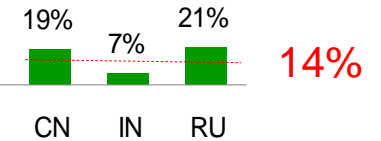
### Established



### Evolving



### Emerging



# Areas of Investigation

**1** Demographics

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**2** Start of Research

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**3** Shopping

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Online & Traditional Resources

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Search

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Online Video

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User Generated Content

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**4** Recommendations

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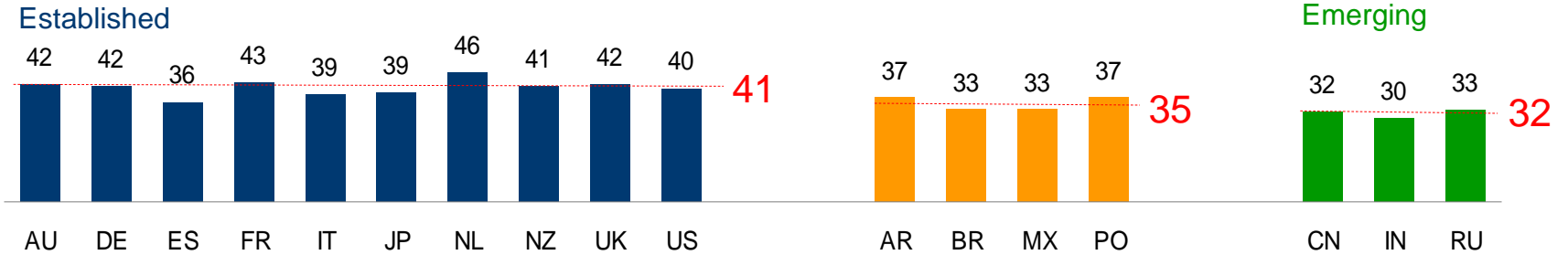


## Demographics

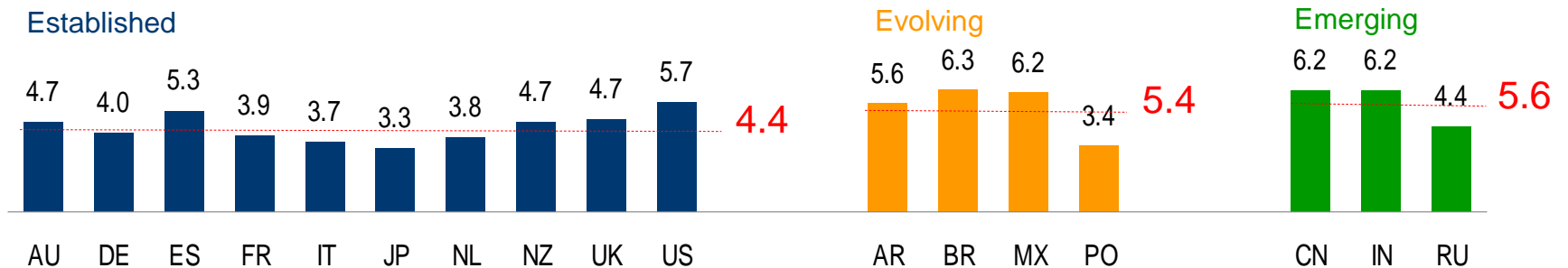


# Age & Hours Online

Age of New Car Buyers, Average



Hours Online, Weekday Average

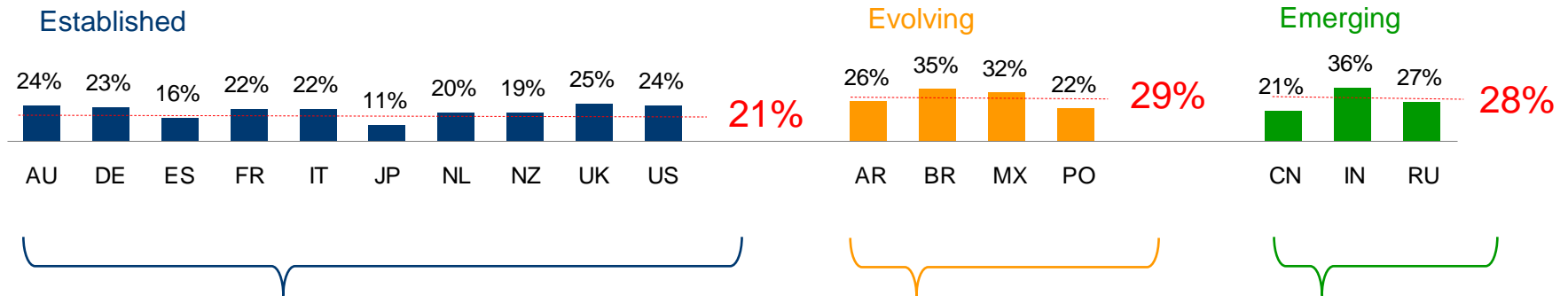


Base: New car purchasers, prior to quota-sampling

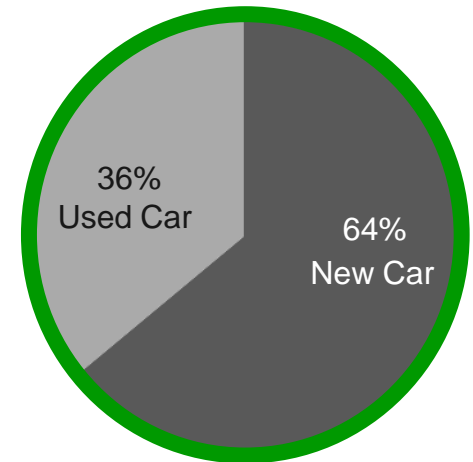
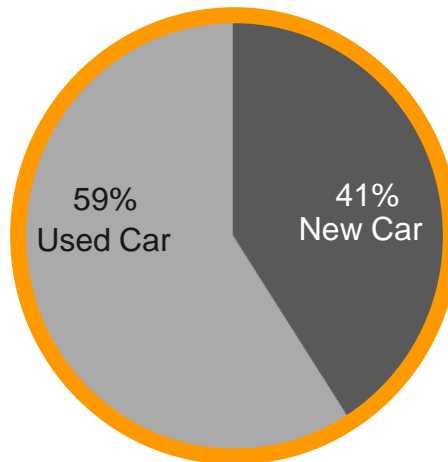
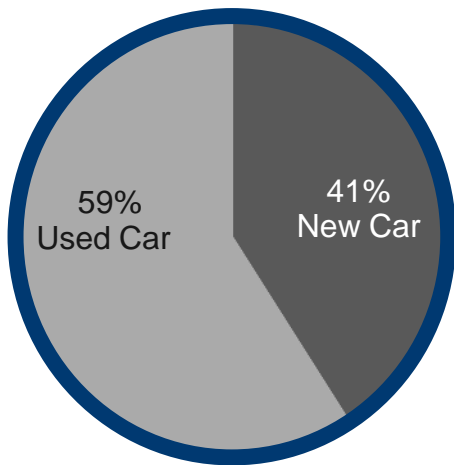
Q: On average, how many hours per weekday do you spend on the Internet? | Please indicate your age.

# Purchase

## Purchased a Vehicle Within the Last 12 Months



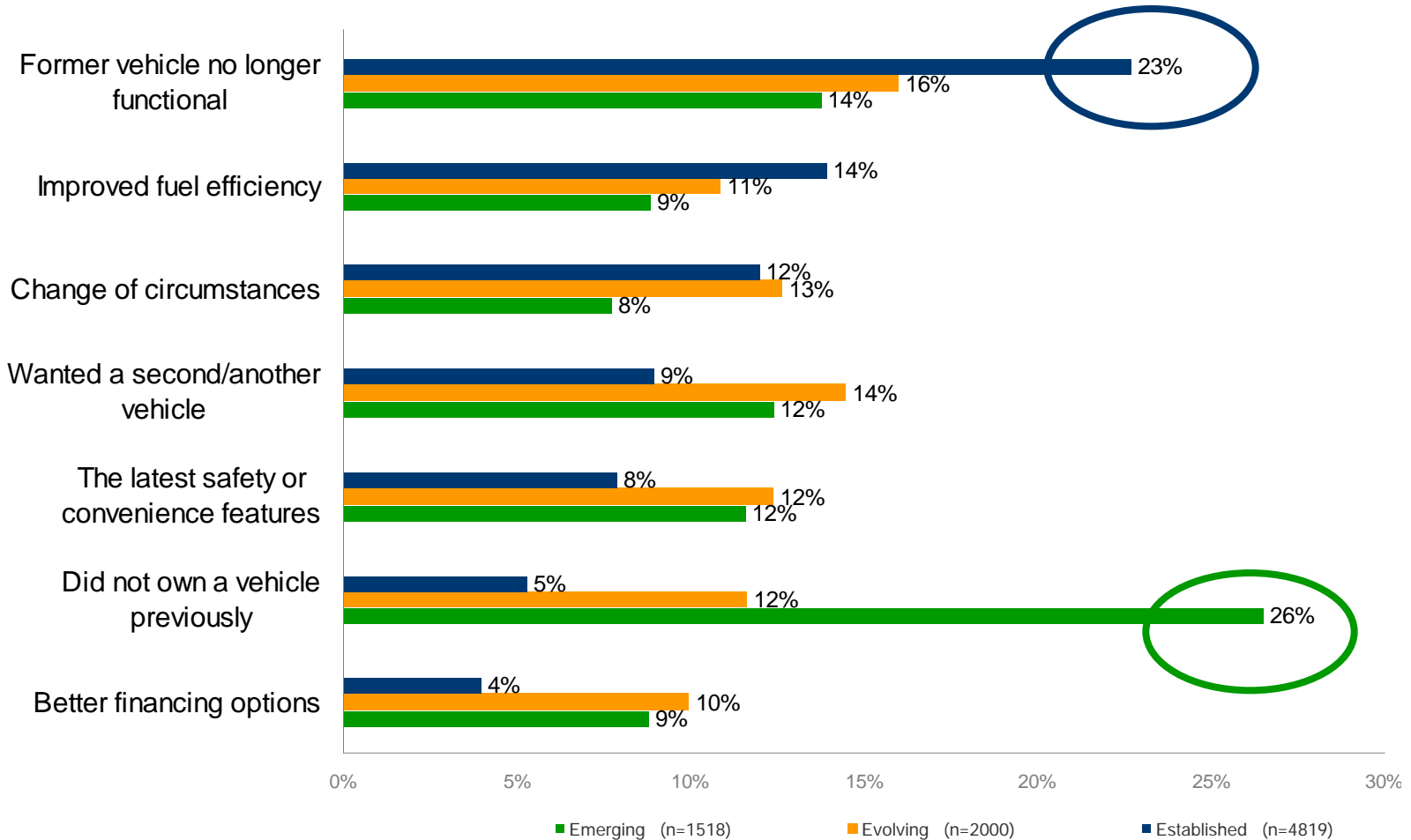
## Type of Purchase





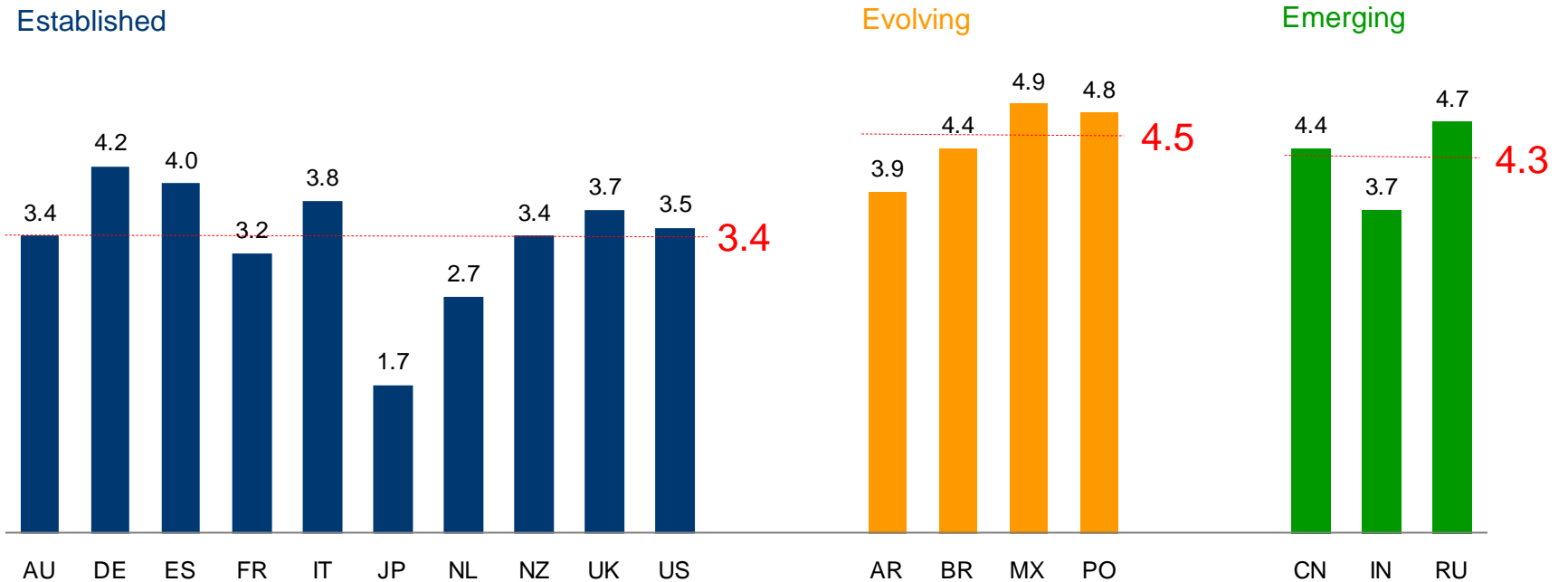
Start of Research

# Purchase Triggers



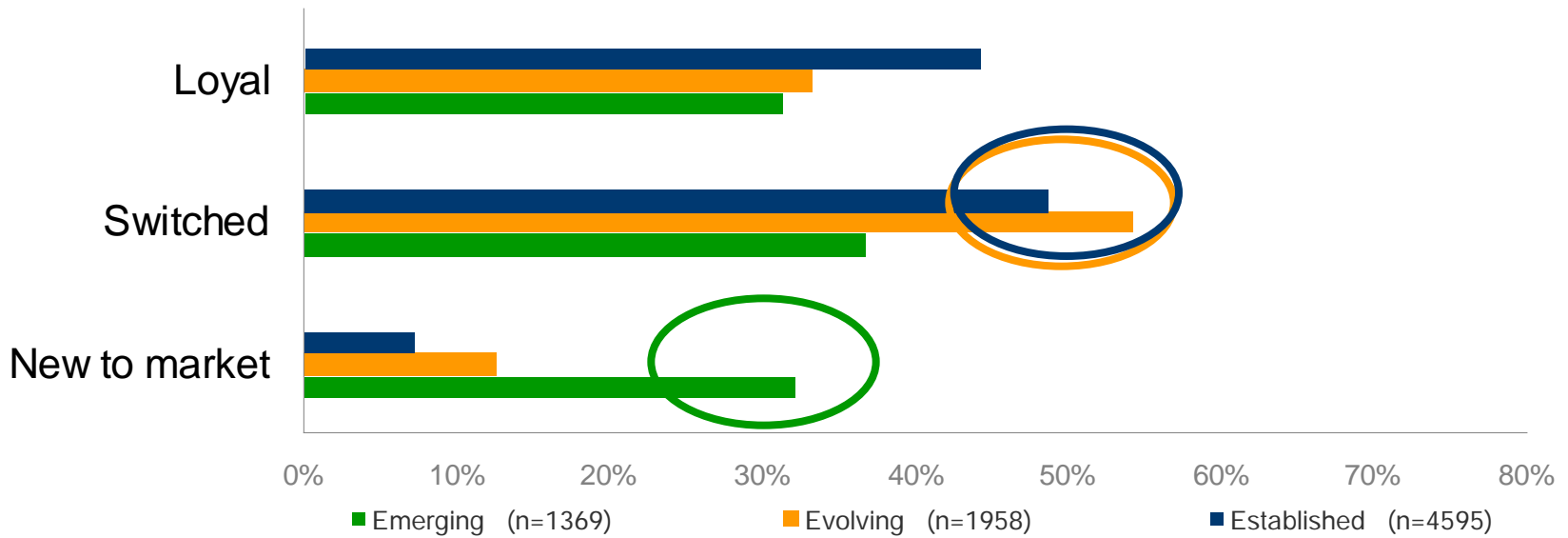
Base: New car purchasers

# Number of Considered Brands



Base: New car buyers

# Loyalty



Base: New car buyers

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

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?

# Length of Shopping Process



n=4819

n=2000

n=1518

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?

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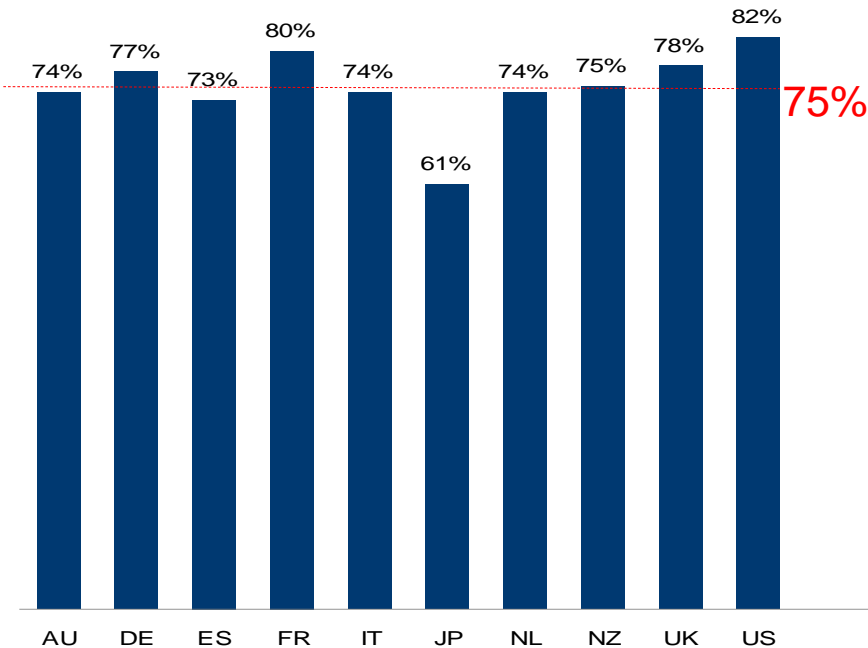


## Online & Traditional Sources

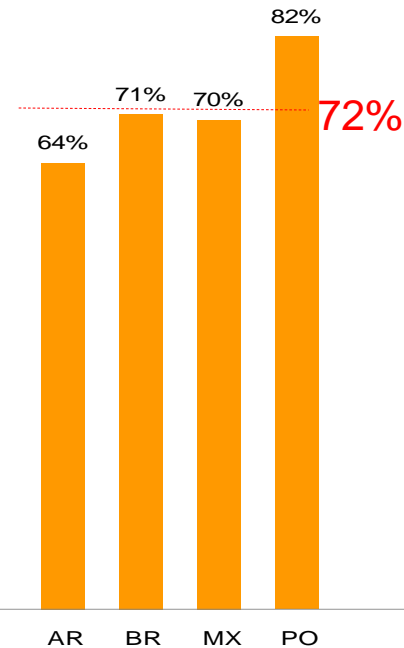


# Internet Use for Auto Research

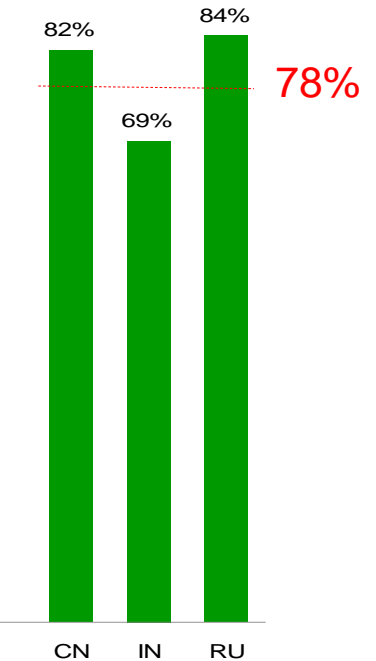
## Established



## Evolving

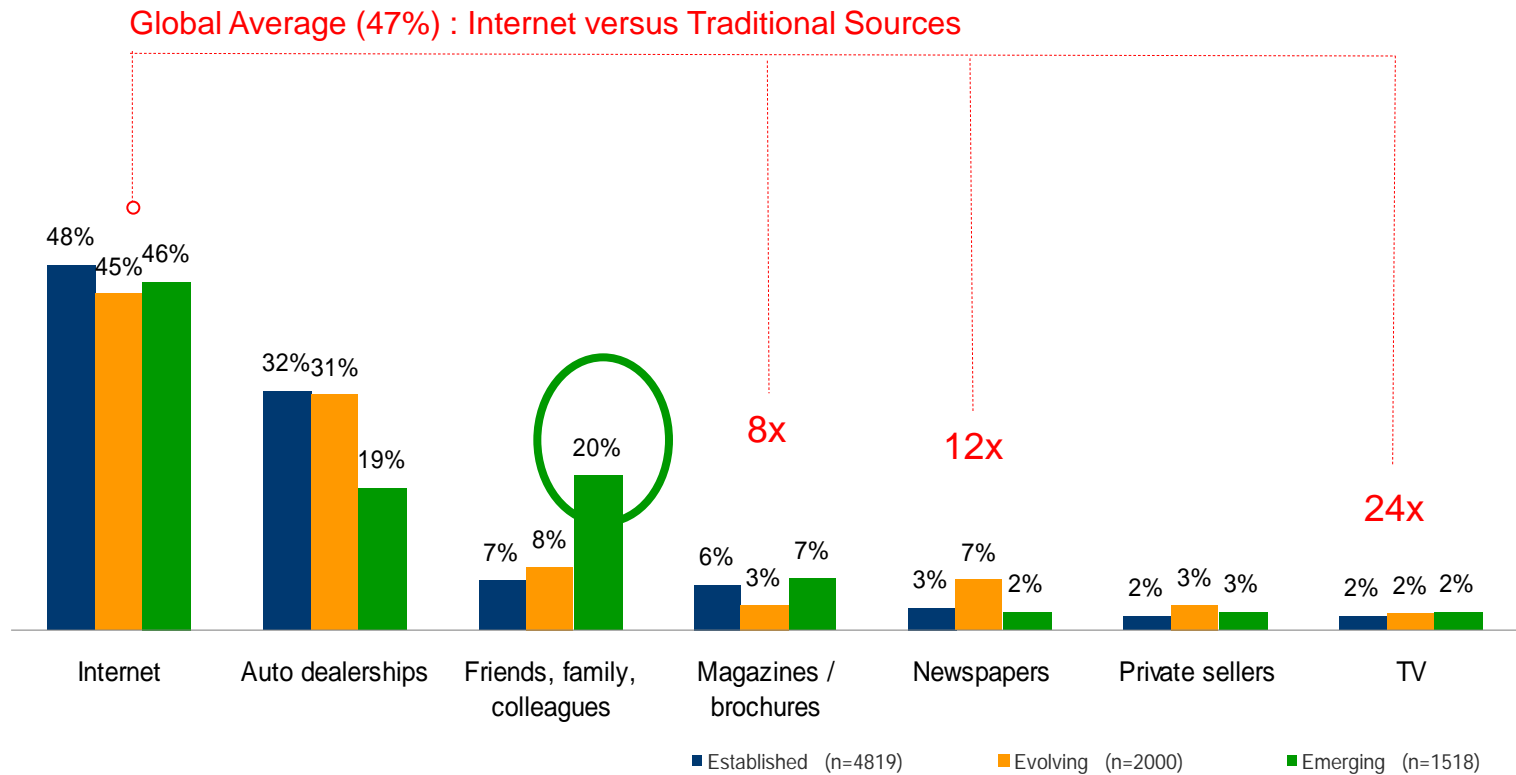


## Emerging



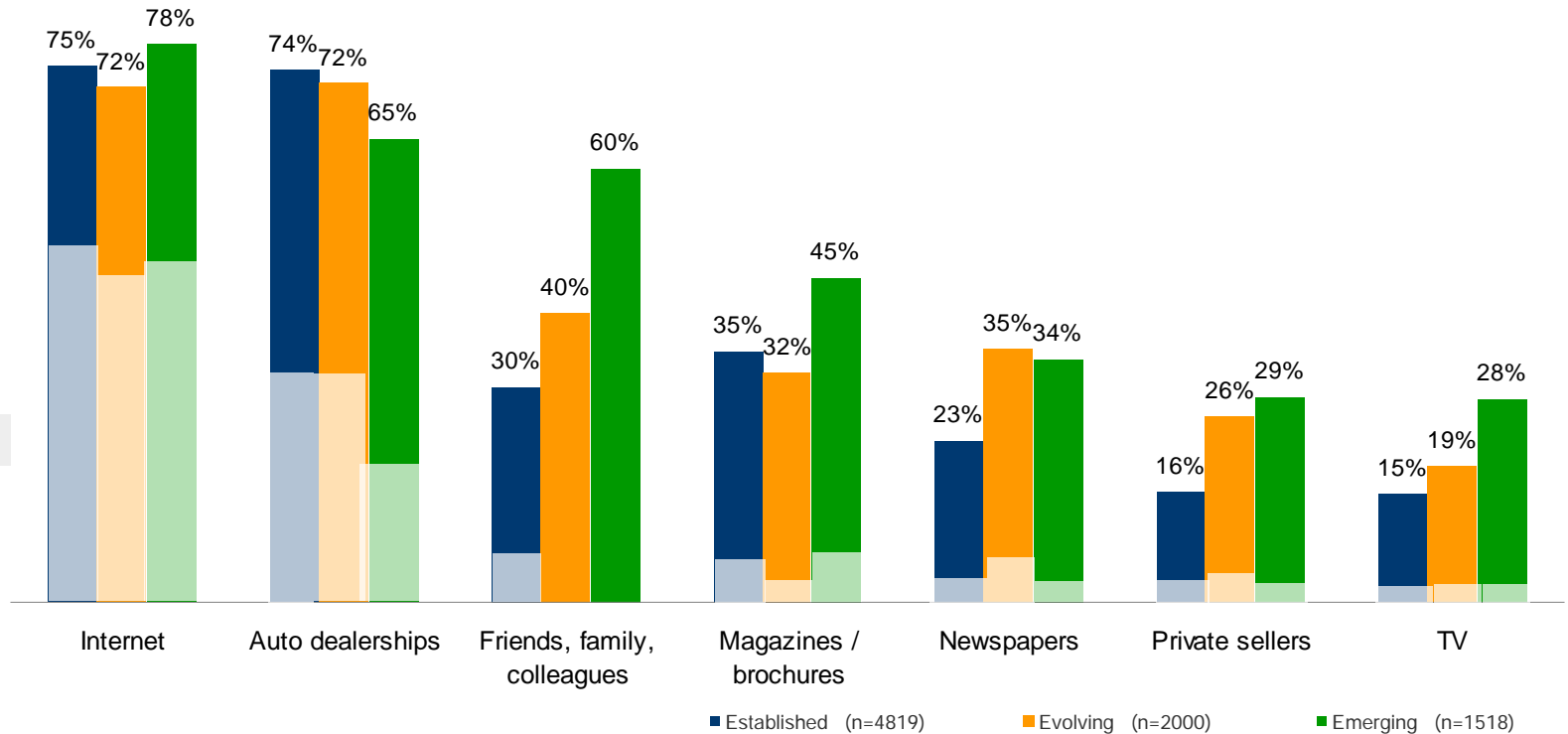
Base: New car buyers

# First Source for Research



Base: New car buyers

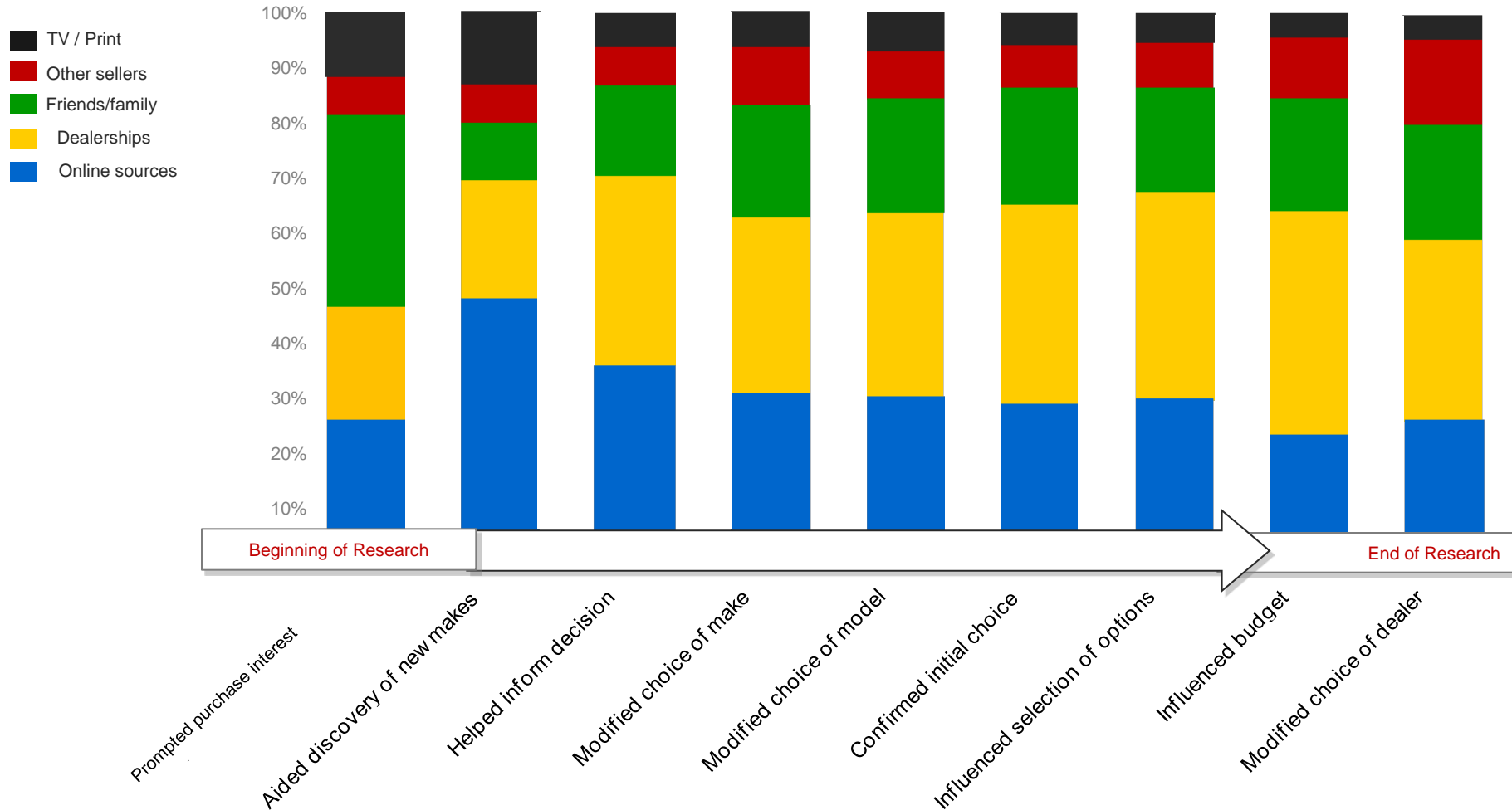
# Sources Used Throughout Research



Base: New car buyers

# Resources Across Research Timeline

## Impact of Channels on the Purchase Decision Process (Global Average)



Base: New car buyers

# Use of Manufacturer Sites

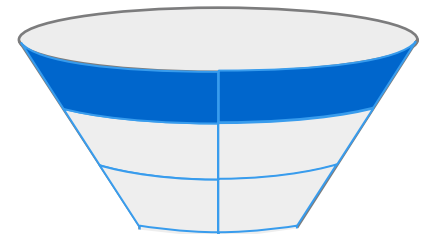
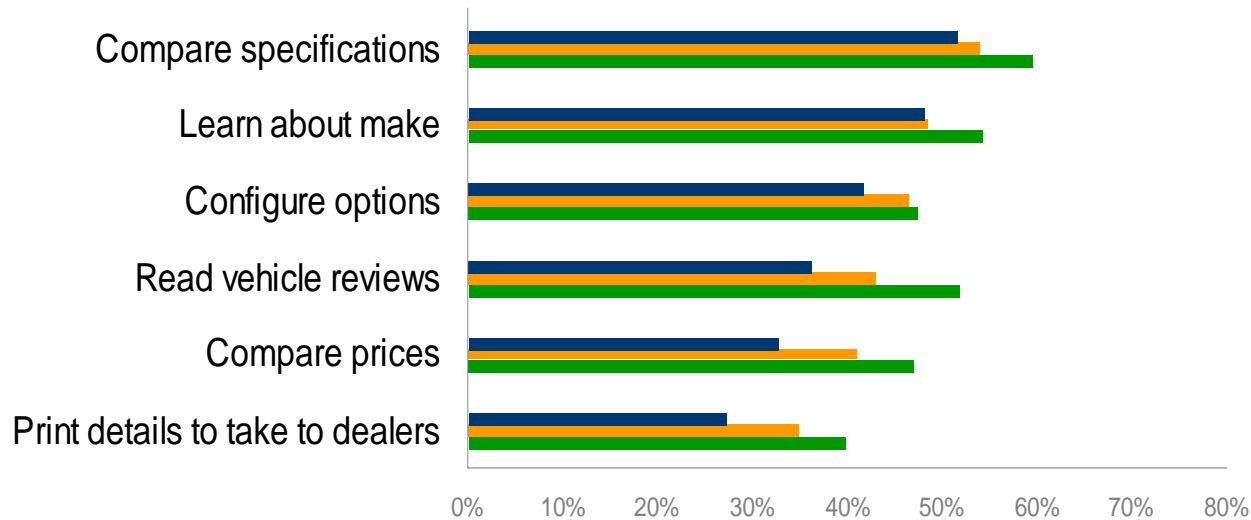
Used manufacturer sites...

Established  
47%

Evolving  
41%

Emerging  
47%

For Car-Related Specifications



Base: New car buyers who used manufacturer sites



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

Source: 2009 Google/Netpop Global Auto Study

# Use of Manufacturer Sites

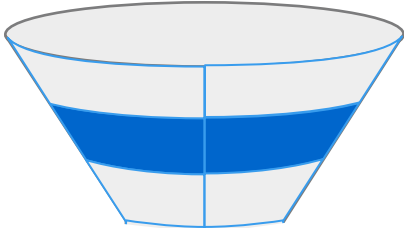
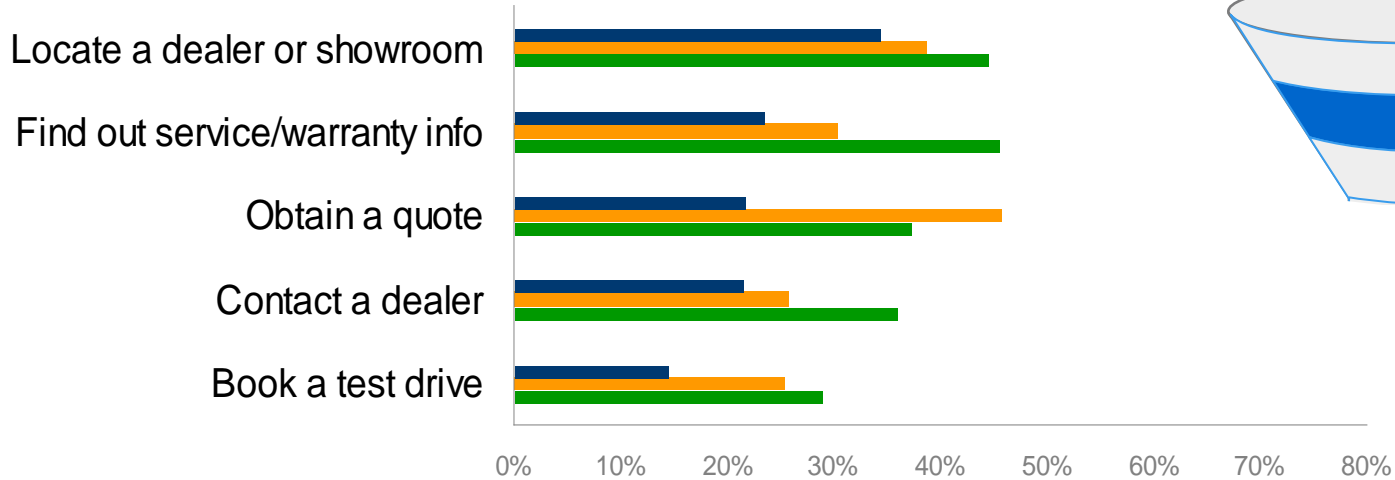
Used manufacturer sites...

Established  
47%

Evolving  
41%

Emerging  
47%

For Dealer-Related Activities



Base: New car buyers who used manufacturer sites



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

# Use of Manufacturer Sites

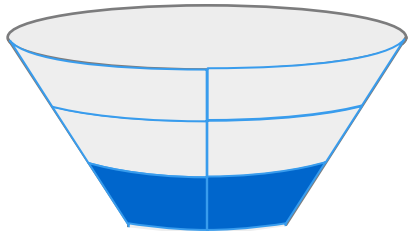
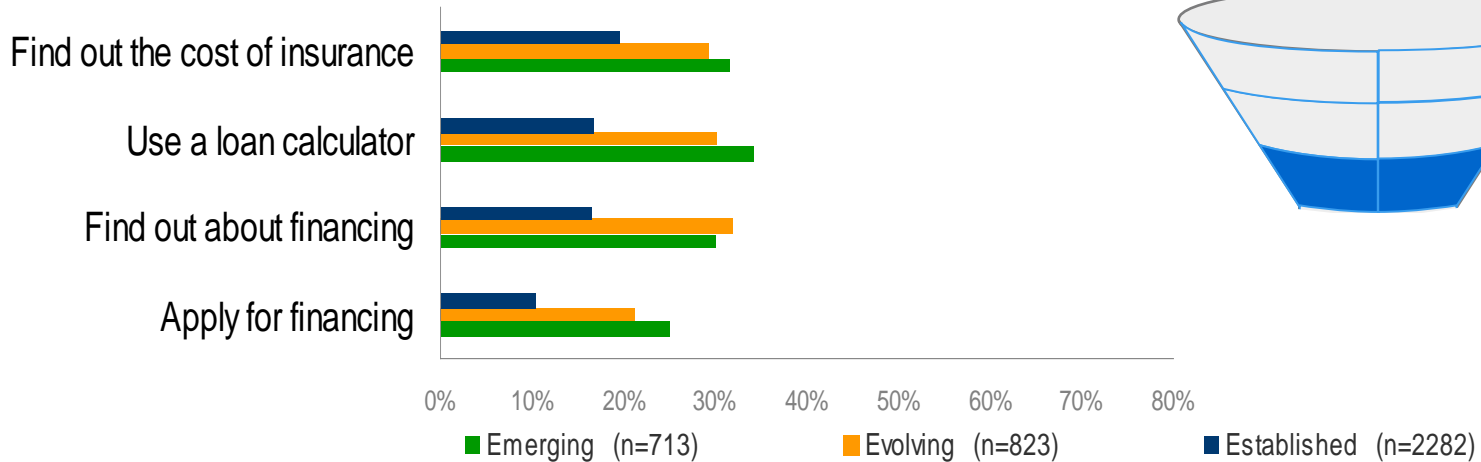
Used manufacturer sites...

Established  
47%

Evolving  
41%

Emerging  
47%

For Purchase-Related Activities



Base: New car buyers who used manufacturer sites



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



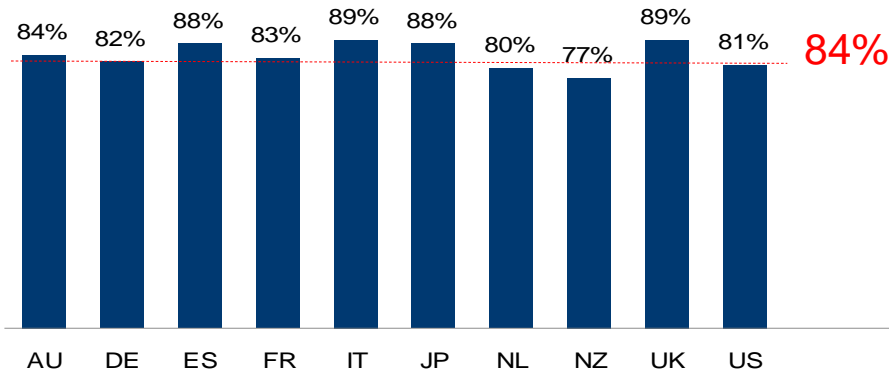
## Search Engines



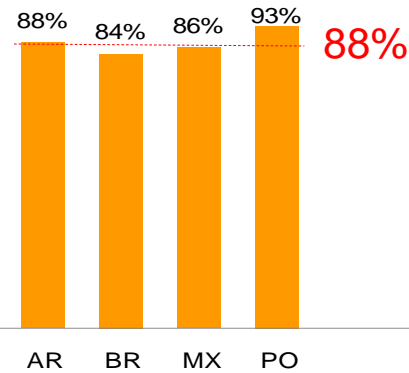
# Use & Importance of Search

## Use of Search as a Source or Gateway

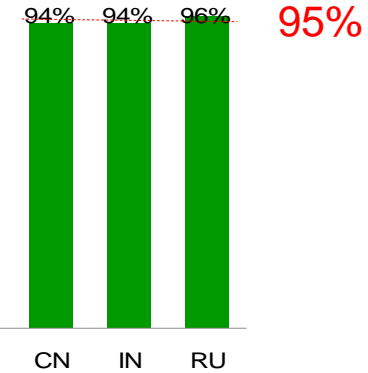
### Established



### Evolving



### Emerging

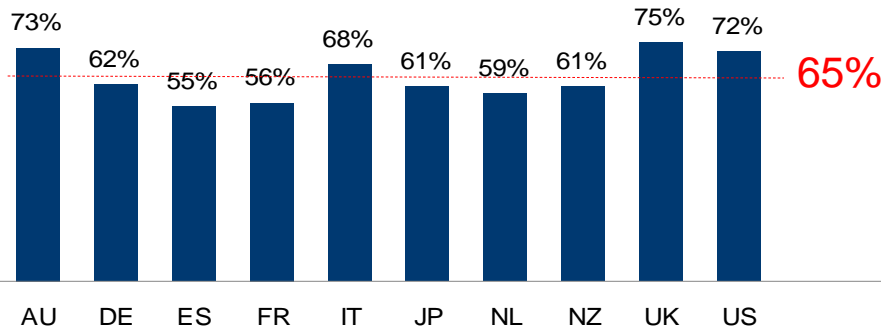


Base: New car buyers who used the Internet for research

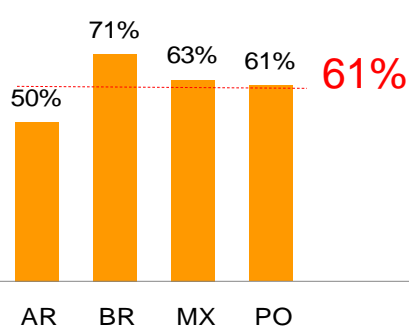
## Importance of Search

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

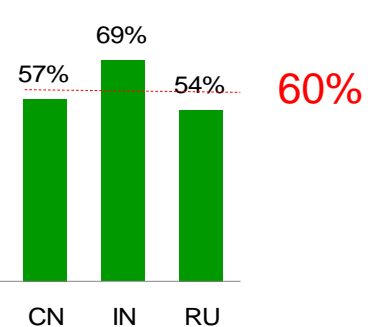
### Established



### Evolving



### Emerging

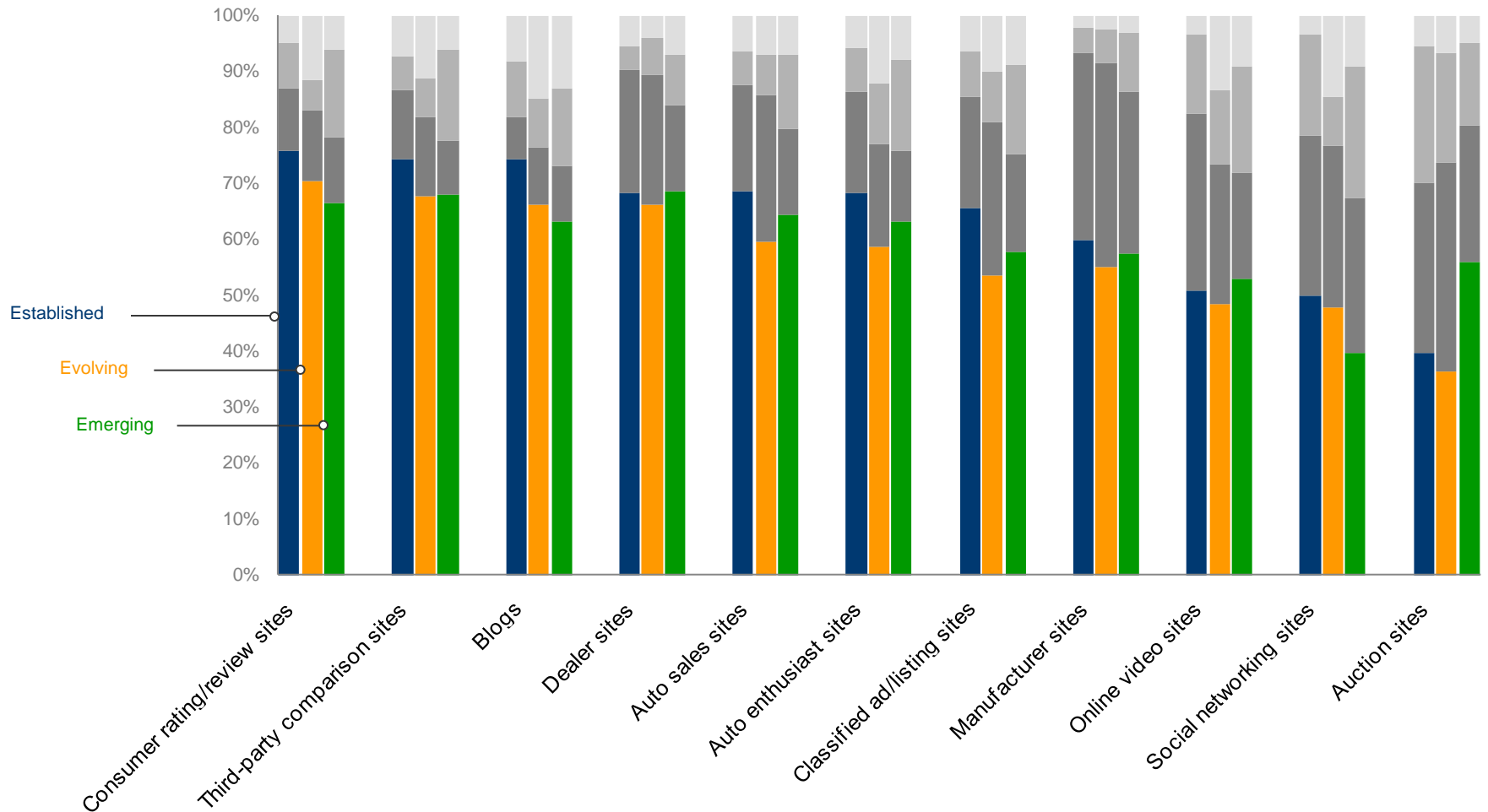


Base: Use search engines as a source

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 important?

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# Navigation to Automotive Sites



Base: Use the site

■ Use a search engine   ■ Type in URL   ■ Site is bookmarked/'favorite'   ■ Follow links from other sources



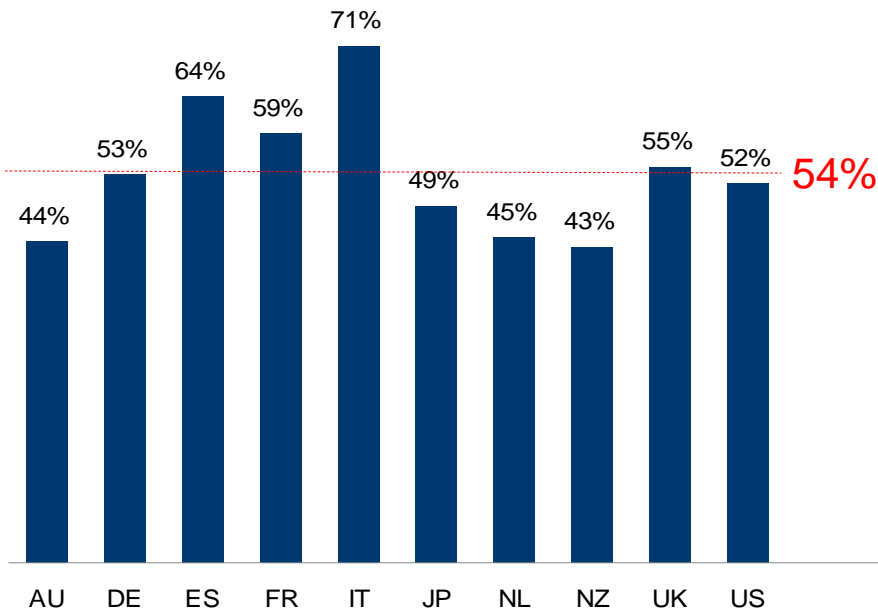
Q: Which methods did you typically use to find the websites you used during your purchase process?

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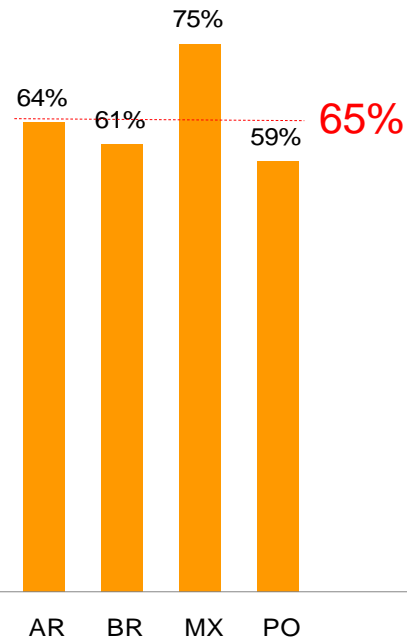
Source: 2009 Google/Netpop Global Auto Study

# Online Automotive Video Viewership

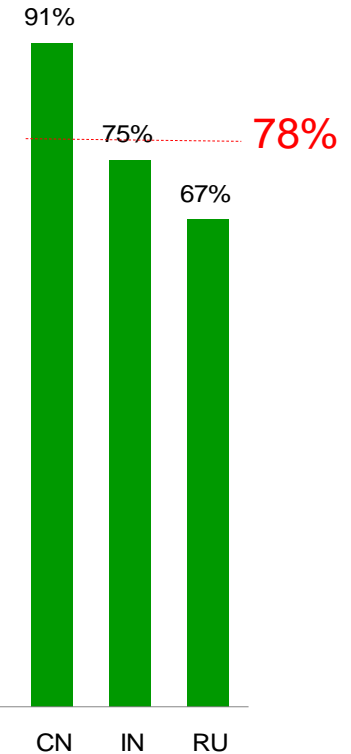
## Established



## Evolving



## Emerging



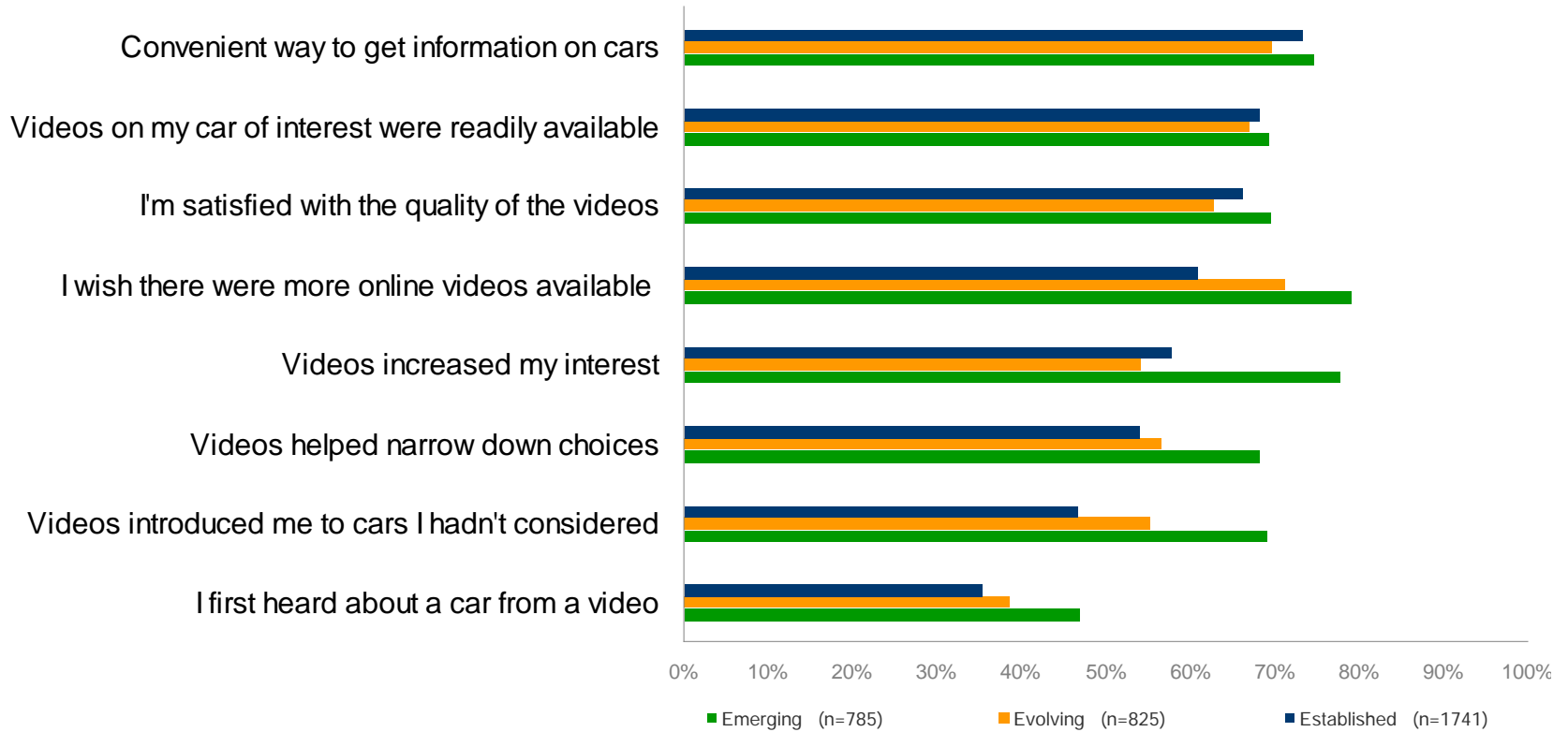
Base: New car buyers who use the internet for car research

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

Source: 2009 Google/Netpop Global Auto Study

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# Benefits of Online Automotive Video

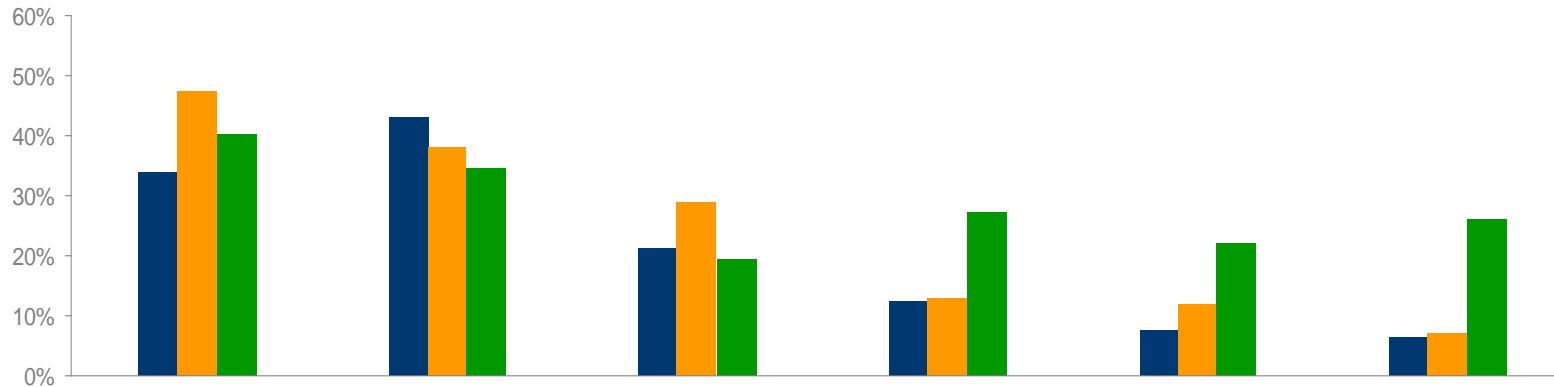


Top 2 box scores (4 or 5 on 5-pt. "agree" scale)

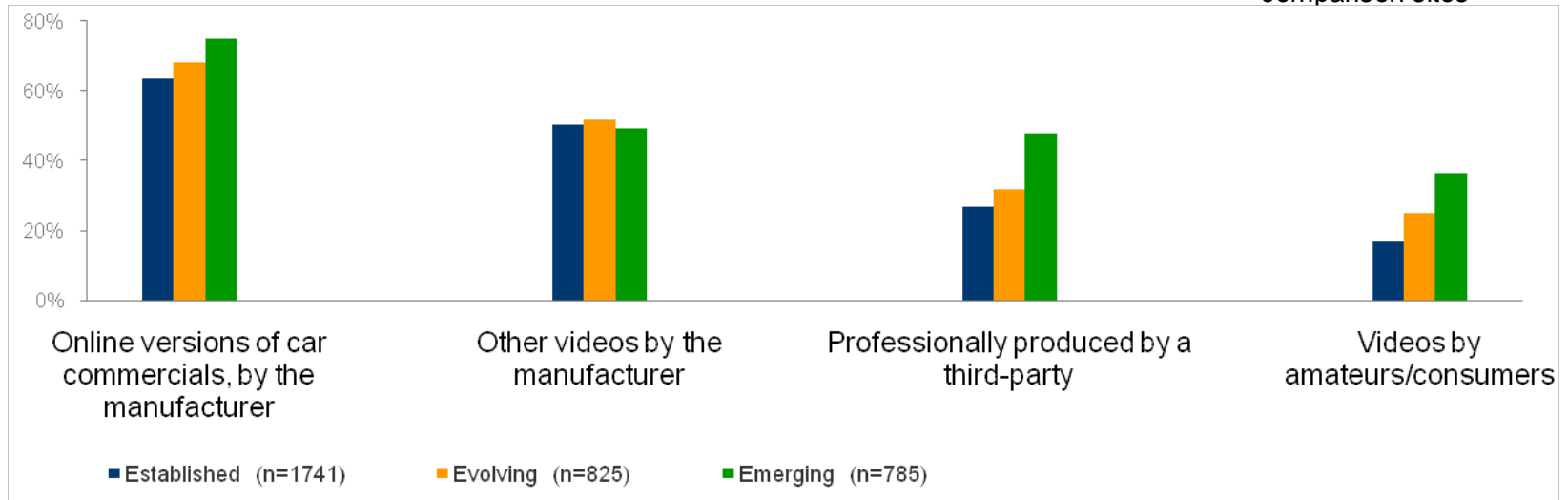
Base: New car buyers who watched videos

# Online Automotive Videos – Sources & Types

Sources for Online Automotive Videos



Types of Videos Viewed



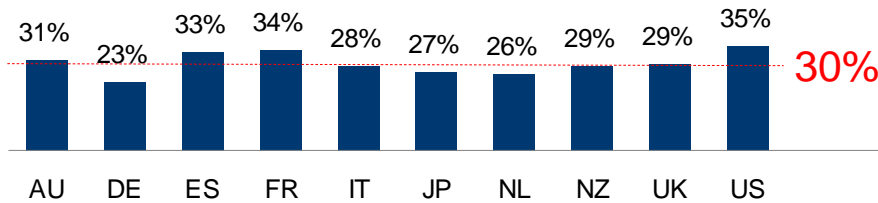


## User Generated Content

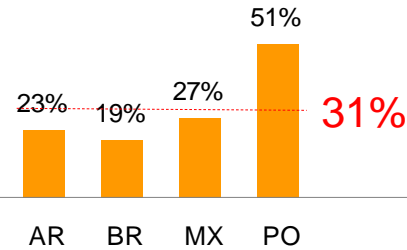
# Reliance on Peer Information

## Use of UGC for Vehicle Research

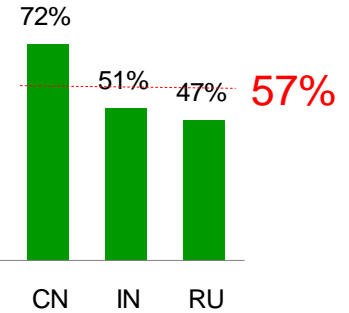
### Established



### Evolving

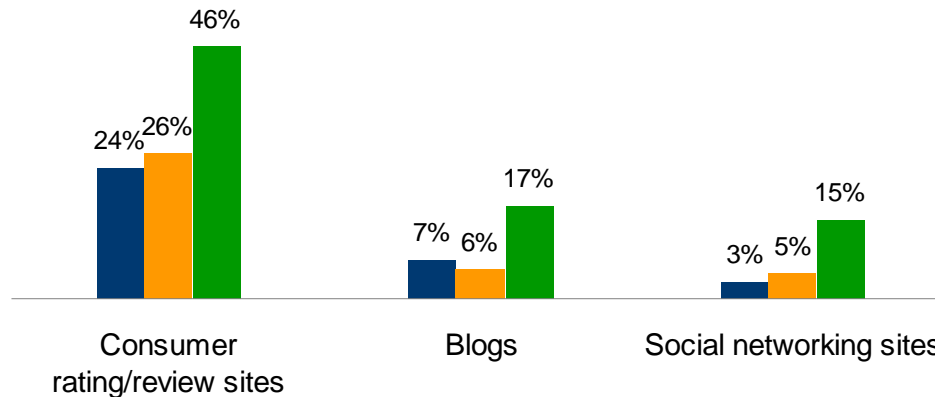


### Emerging



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

## Types of UGC for Vehicle Research

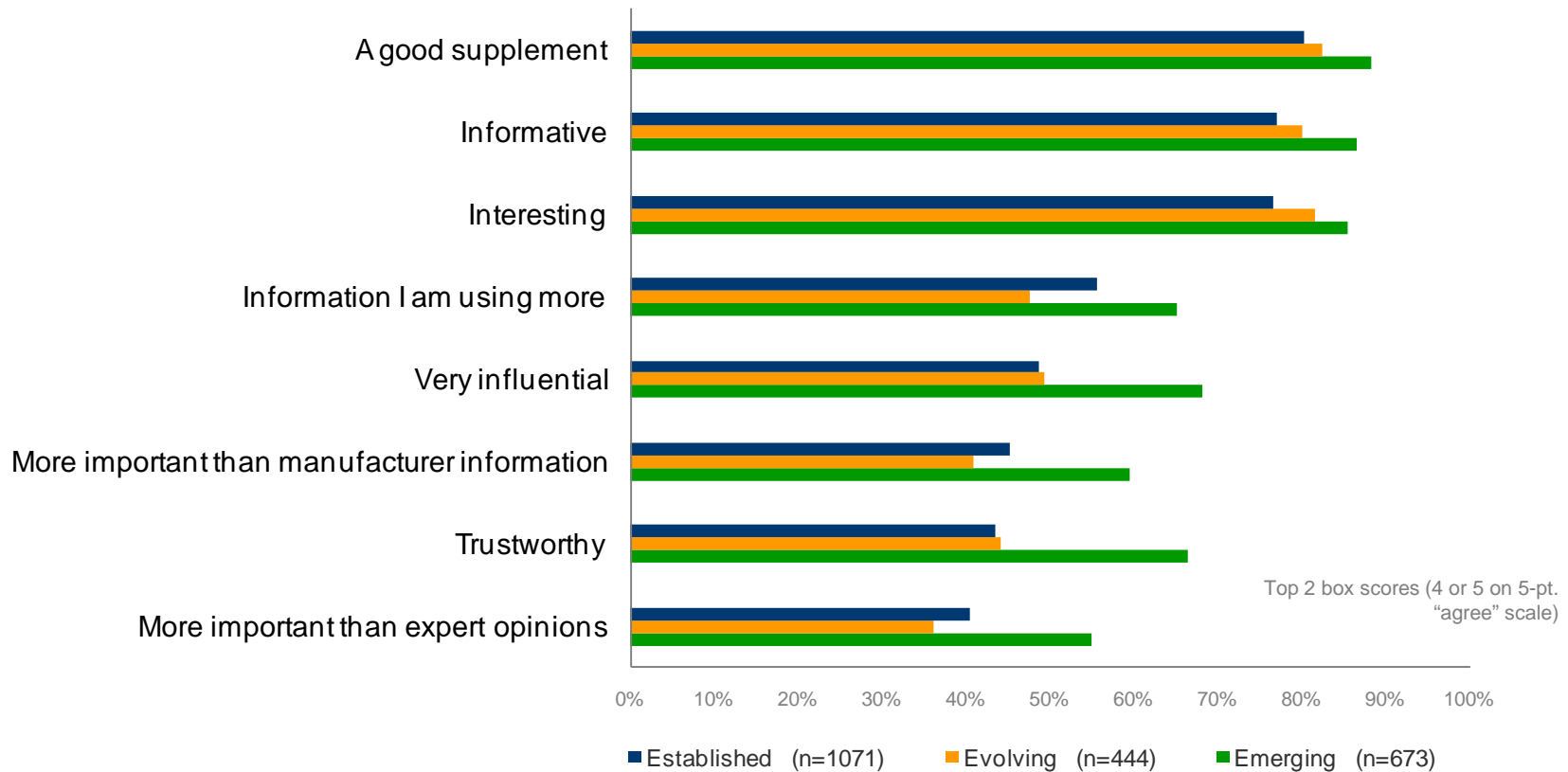


Base: Use the internet for research

■ Established (n=3612) ■ Evolving (n=1433) ■ Emerging (n=1185)

# Car Buyer Opinions on UGC

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



Base: Use UGC



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