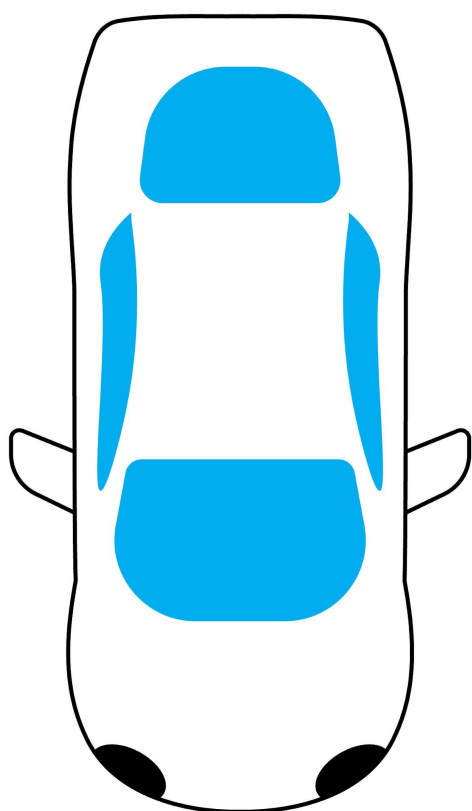


WHAT'S NEXT IN AUTOMOTIVE INDUSTRY

A GLOBAL CONSUMER RESEARCH STUDY TO UNVEIL THE GROWTH ACCELERATORS

The Global Automotive Industry experiences the biggest transformation of its history in the last century moving forward and adopting technological advancements in the area of autonomous driving, connected driving, e-mobility. In parallel, significant shifts are observed in society and customer behavior in terms of mobility usage, car ownership, buying preferences, car maintenance.

Nielsen Global Automotive Syndicated study provides OEMs, OESs and Organizations involved in the Automotive industry with holistic understanding of the customers' behavioral changes and unveil the growth accelerators supporting organization to adjust their strategies at Global and Country Level.



MOBILITY & BUYING BEHAVIOR



CONSUMERS PROFILE & COMMUTING SEGMENTATION

- Vehicle ownership details
- Commuting habits, transportation means by occasion
- Needs and expectations from vehicles
- Needs and expectations from other means of transportation (*inc. public transportation*)
- Attitudes towards vehicle ownership
- Attitudes towards new mobilities (*Car sharing, Autonomous driving, Robot taxi*)



BUYING PROCESS & PURCHASE JOURNEY

- Purchase intention
- Shifts towards used or new vehicle
- Shortlist of model segments
- Prospect Engine Types - Deep Dive EV
- Touchpoints & Sources of information
- Channels preference and expectations from the point of sales
- Financing options (cash, loan, leasing)
- Preference of private leasing and subscription model
- Role of equipment and accessories
- Potentiality of equipment on demand
- Importance of connected driving

AFS - MAINTENANCE PATTERNS



- Maintenance behavioral patterns
- Selection criteria of point of M/R
- Reasons for selection and reasons for leaving each point of M/R (*incl. Authorized repairers, independent repairers, e-commerce*)
- Selection of channel by type of M/R
- Expectations from point of M/R
- Satisfaction level from point of M/R
- Sources of information around maintenance and repair
- Intention and attitude toward the Connected After Sales

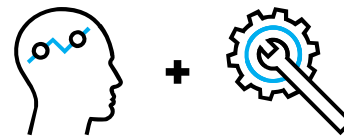
INVESTMENT



MOBILITY & BUYING BEHAVIOR
USD 2500 - 3500



AFS - MAINTENANCE PATTERNS
USD 2500 - 3500



BUNDLE OFFER
USD 4500 - 5500

MARKETS IN SCOPE



Brazil, China, Germany, India, Russia, South Korea, Thailand, Turkey, UAE, UK, USA
Other Countries available upon request.

METHODOLOGY AND LEVEL OF ANALYSIS



Online Survey - Self Completion with up to 25 minutes length questionnaire.

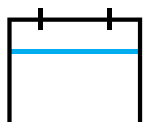
Findings will be analyzed by: Generation, Premium Brands Segment vs. Mainstream brands, Model Segment (primary segments with share >20%)

TARGET RESPONDENTS AND SAMPLE SIZE



- A. **Representative** sample of general adult population by market of n = **1.000 -1.500 interviews**, (depending on country) to understanding the mobility and buying behavior
- B. **Passenger Car Drivers**, n=**500 – 800** interviews, depending on country, to understand the maintenance patterns.
- C. **Special Target Audiences** (E.g. Car Sharing Users, EV Buyers / Intenders) are covered upon request

TIMELINE



Fieldwork: January - February 2021
Report available: March-April 2021 (Depending on the Country)

TO PURCHASE NIELSEN'S LATEST REPORT OR REQUEST A STUDY TAILORED MORE TO YOUR NEEDS, PLEASE CONTACT YOUR LOCAL NIELSEN CONSUMER INSIGHTS REPRESENTATIVE OR
[**CONSUMER.INSIGHTS@NIELSEN.COM**](mailto:CONSUMER.INSIGHTS@NIELSEN.COM)