



THE 2021 AUTO BUYER

Uncovering Findings from Urban Science Consumer Studies



URBAN SCIENCE®

A close-up photograph of a person's hand on a steering wheel. The hand is wearing a dark, multi-dial watch with a metal link bracelet. The steering wheel is black and has a silver-colored center. The background shows the dashboard and windshield of a car. A large, semi-transparent dark grey circle is overlaid on the left side of the image, containing the text '82%' in large green font and a paragraph of text in white font below it.

82%

of adults agree that there are certain elements of the vehicle purchase process that cannot be replicated online and should be done **in-person.**

Of those who agree...

80%

point to **test drives** as elements of the purchase process that cannot be replicated online



Of those who agree...

81%

agree a vehicle is **too big of an investment** to risk **not seeing it for yourself before buying**



No test drive, no deal.

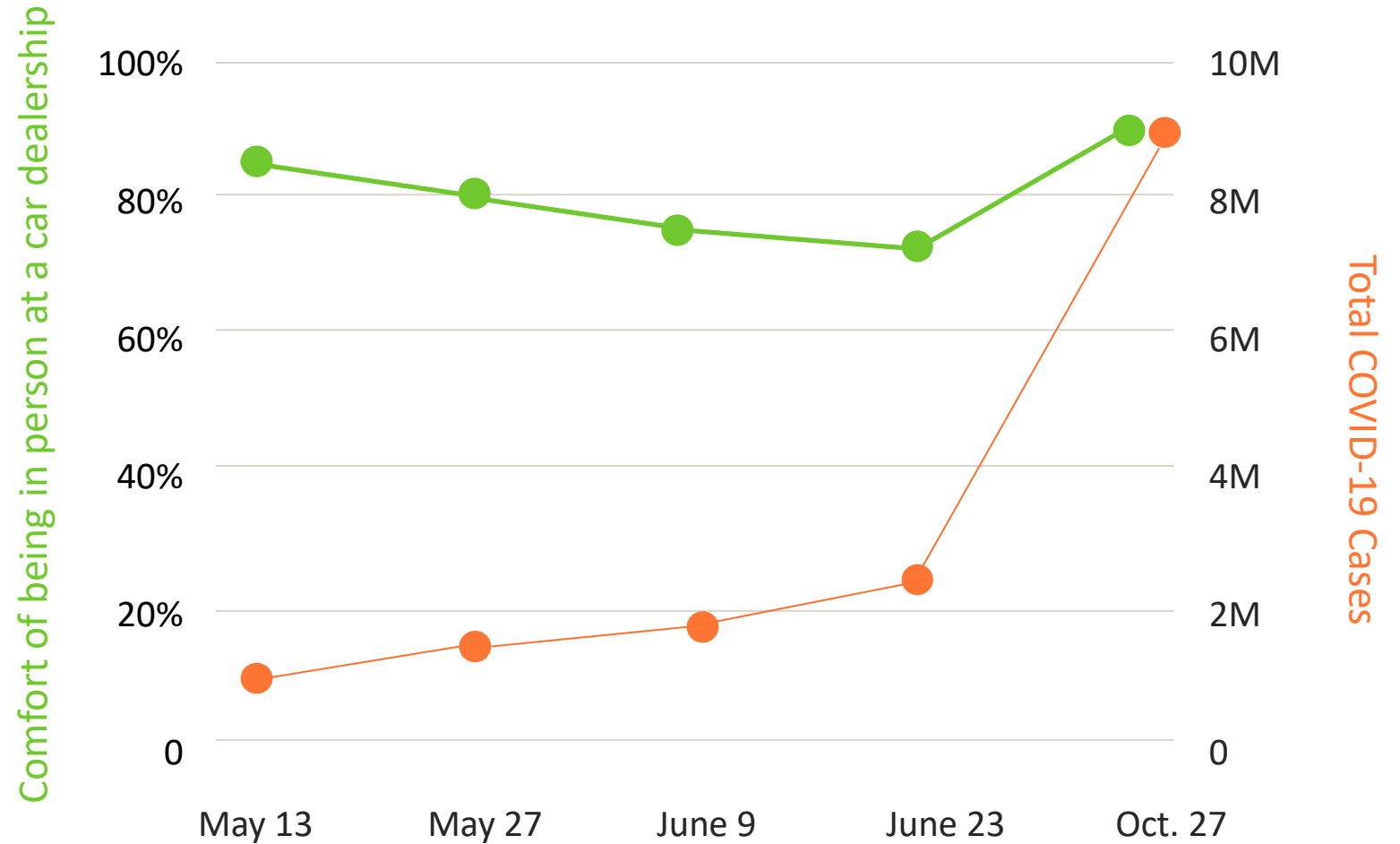


79%

of consumers agree they would never buy a vehicle without **test driving it first**

Consumer comfort level vs. rising COVID-19 cases

Consumers are growing increasingly comfortable with visiting dealerships **despite** dramatic rise in cases



Comfort level by generation



64%

believe it's completely safe to visit a dealership today.

Younger generations are consistently more comfortable visiting dealerships compared to their older counterparts



Of the younger generation, older Millennials are the most comfortable at

51%



COVID hasn't changed *everything*.

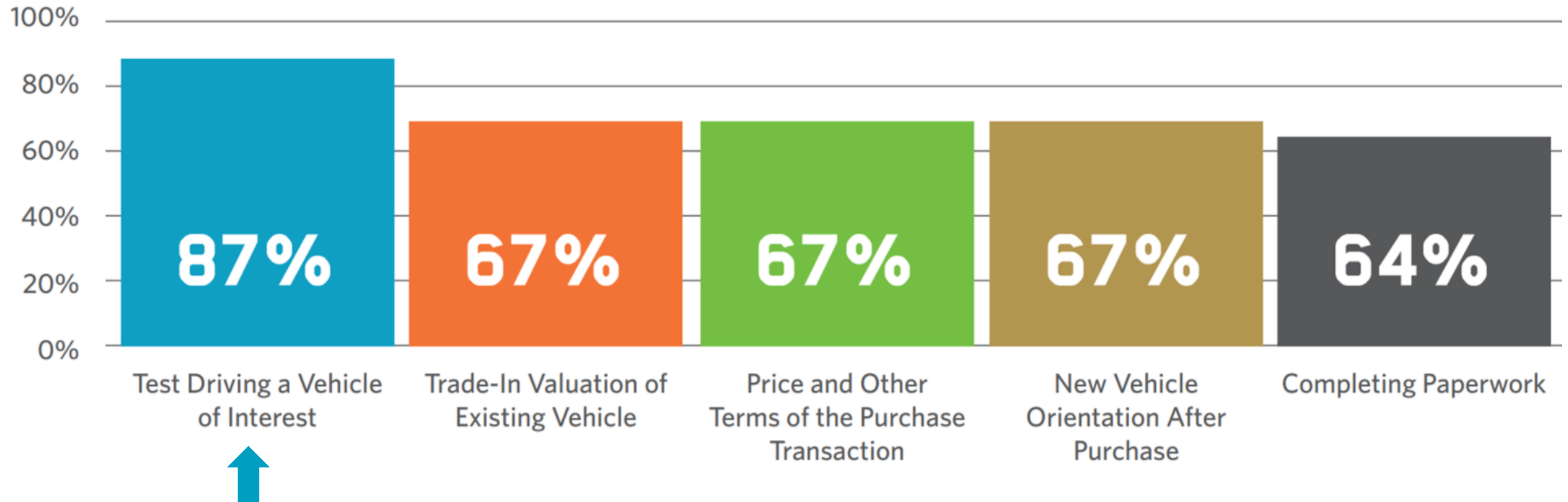
Despite the rise in COVID-19 cases across the U.S.,

86%

of consumers
report being
very/somewhat
comfortable with
buying a vehicle
in person

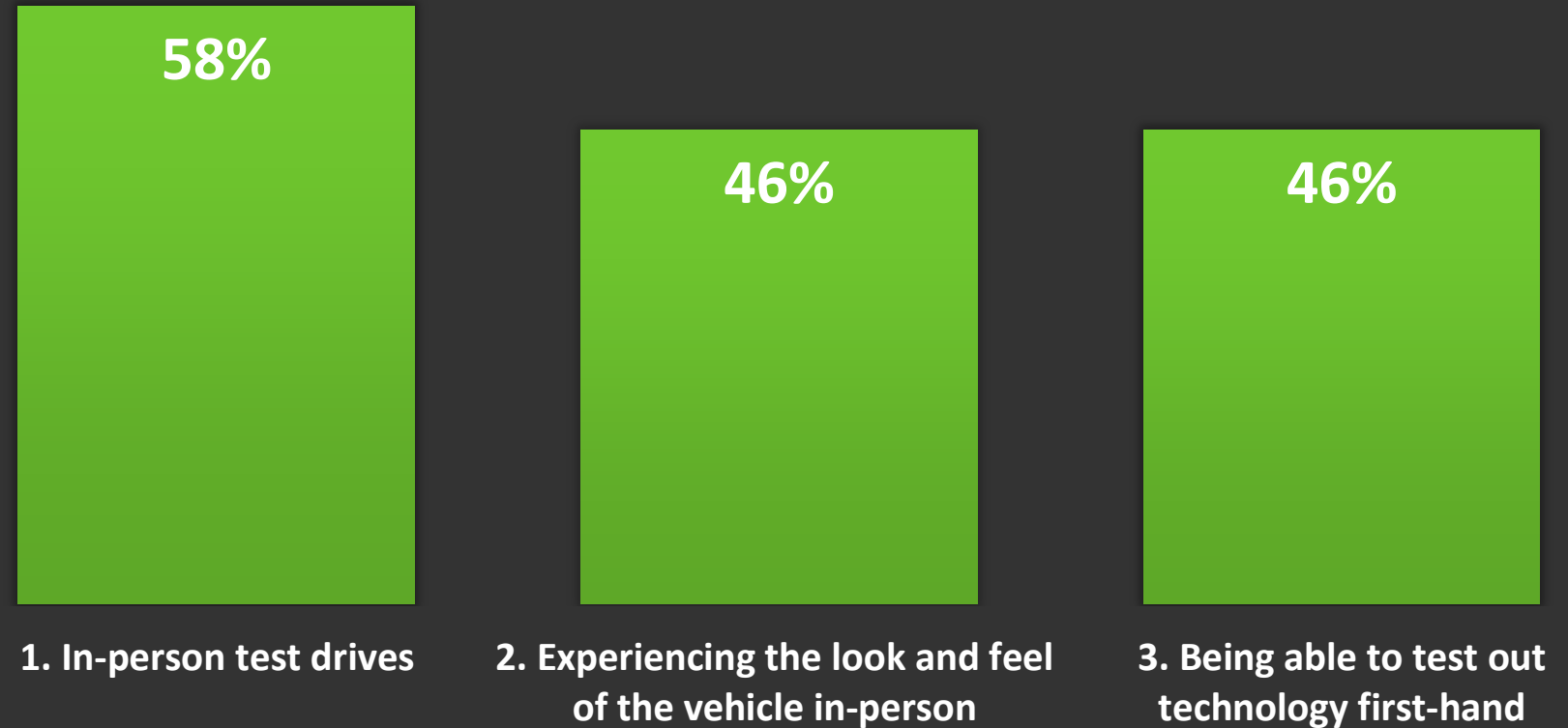
Are consumers ready to purchase exclusively online?

No. While some aspects are preferred to be completed online, most adults say that in-person at a dealership is the most helpful to ensure a positive experience, especially when it comes to:



What would you miss about an in-store experience?

What would you miss the most if the entire purchase process moved online?



A man with a beard and short brown hair, wearing a grey suit jacket, a light blue shirt, and a dark tie, is sitting in the driver's seat of a car. He is looking out the window to his right. The car's interior is visible, including the steering wheel and dashboard. The background shows a car dealership with other vehicles and a sign.

Test drives are the most important thing consumers want to do at a dealer

What's different post-pandemic? Limiting # of Dealers

7/10

(71%) agree they would **limit the number of dealerships** they visited if they were purchasing or leasing a new vehicle right now due to health/safety concerns.

People are more mindful about where they choose to visit. **They're most likely to visit the dealer that engages with them in a meaningful way**, such as a \$50 test drive incentive.



Dealerships & salespeople remain as vital if not more than in 2019

71%

agree dealer salespeople have an expertise that is necessary to help people navigate the complex vehicle-buying process.

65%

would not want to buy a vehicle today without a dealership involved.

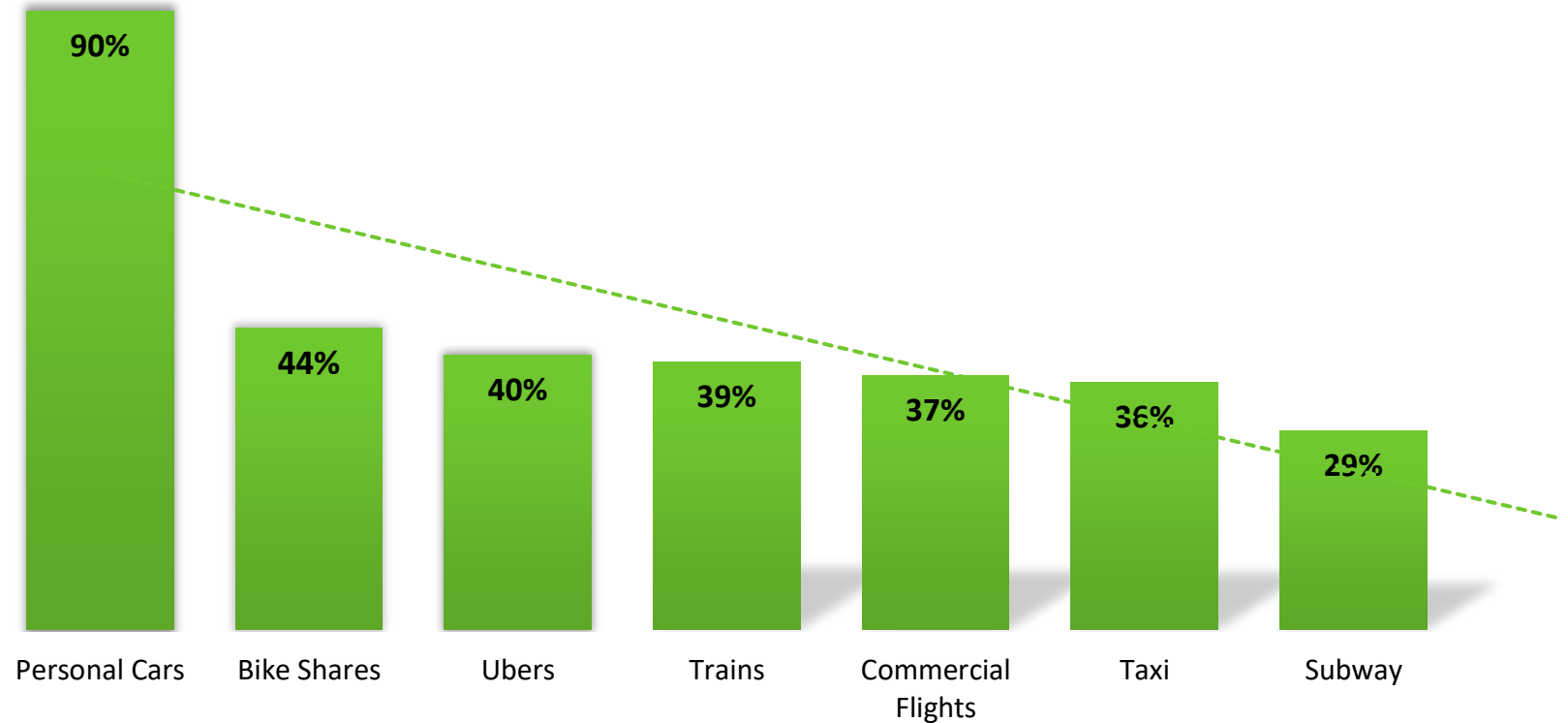


Declining Sentiments Around Public Transportation

When asked, “How safe do you feel traveling by the following means of transportation right now?”

(Summary of Very/Somewhat Safe)

The Harris Poll’s COVID-19 tracker data found that **personal vehicles** were by far considered the safest means of transportation.



COVID-19 could increase the number of people buying vehicles

About **HALF** of consumers expect that more people will use a personal vehicle and less people will use shared or public transportation even after the pandemic is behind us.



Adults living in cities are most motivated to buy

City dwellers are

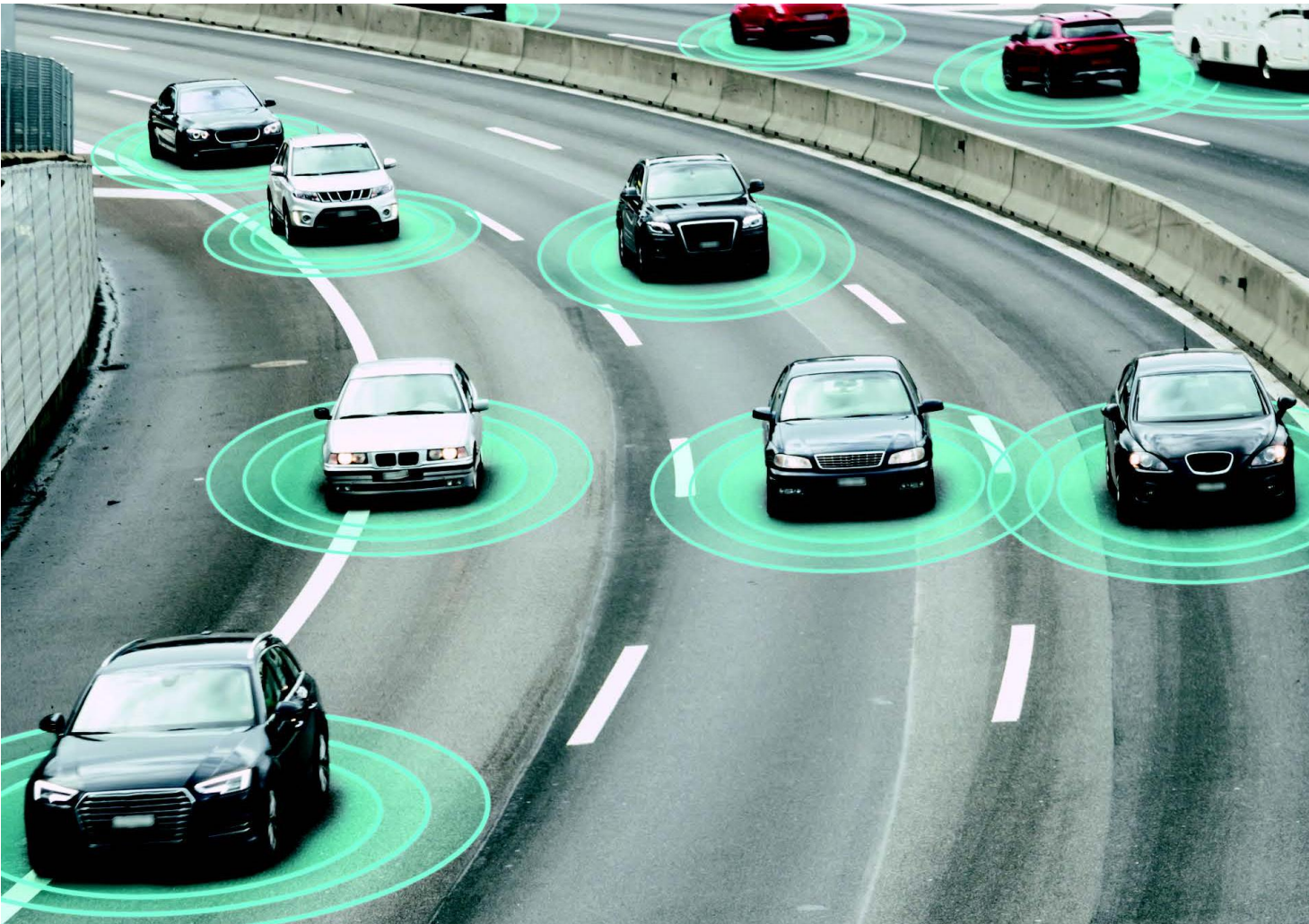
2X's

as likely to buy a car this year, compared to those in suburban and rural areas.

4 IN 10

**ADULTS LIVING IN URBAN
AREAS REPORT THEY'LL
BUY WITHIN THE NEXT YEAR**

Over half say they want used or pre-owned

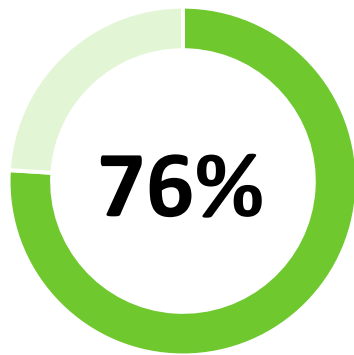


55%

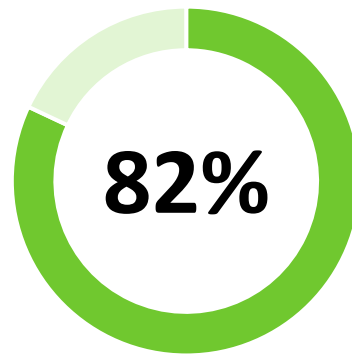
More than half of adults say it is **smarter to purchase/lease a used vehicle** instead of new at this time.



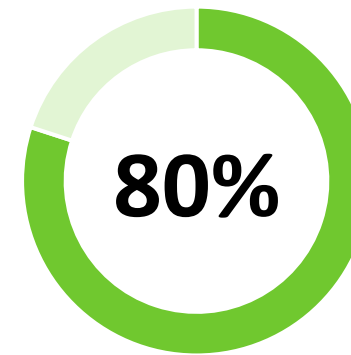
Overall, Dealers are confident that consumers are relying on their website inventory more than ever as a result of growing inventory shortages.



Consumers are more likely to buy the vehicle they submitted a lead for



Inventory views have increased during the pandemic



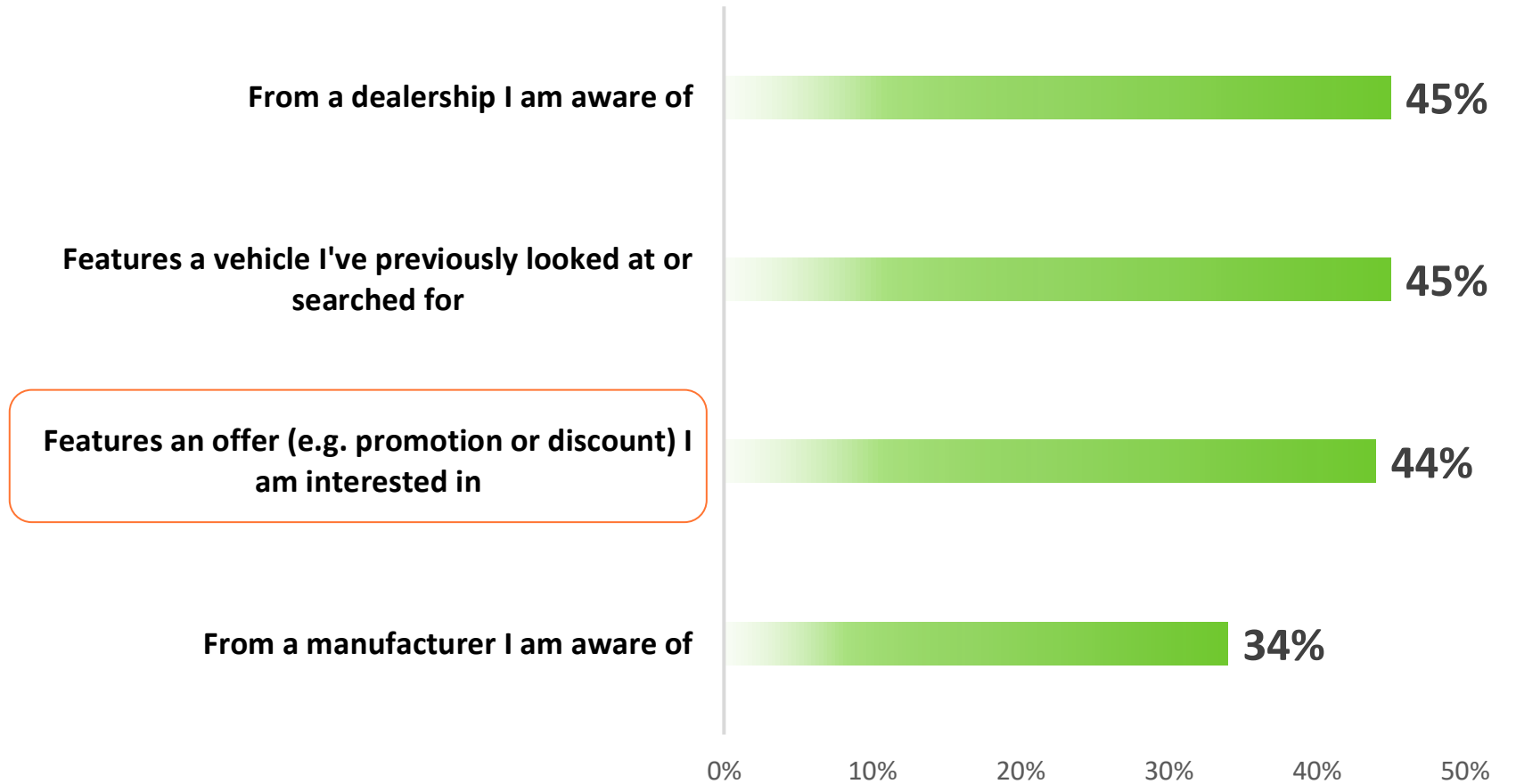
Consumers are submitting leads from further distances based on inventory

Top motivating factors to click on an online ad

Of those who intend to purchase a vehicle in the next year...



Online Behaviors

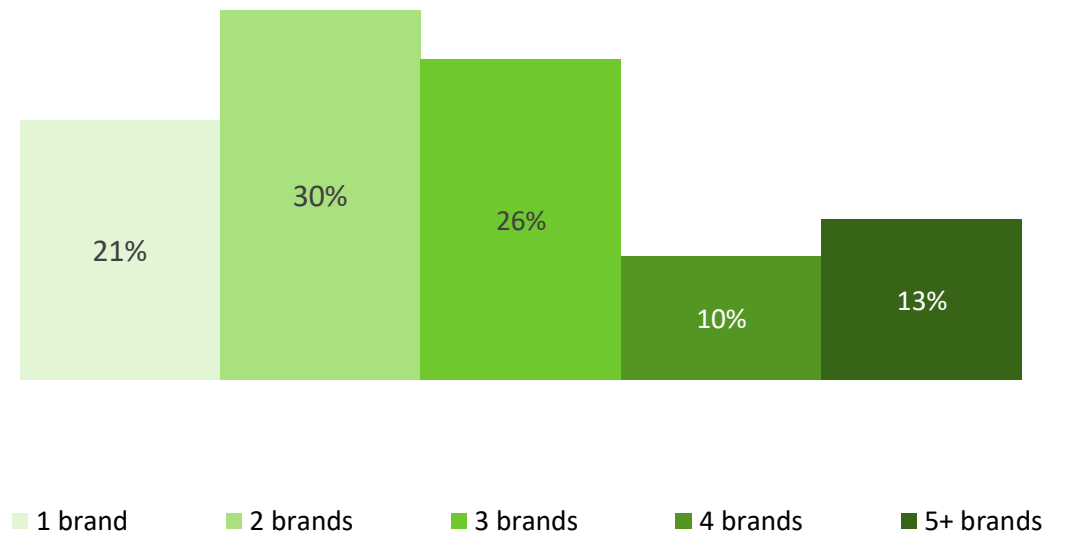


How loyal are your buyers?

79%

of new car buyers consider **more than one brand** before purchasing

On average, the new auto-buying public considers **3 BRANDS** when purchasing/leasing a vehicle



Dealership consideration and visitation is high

On average, the general auto buying public visits

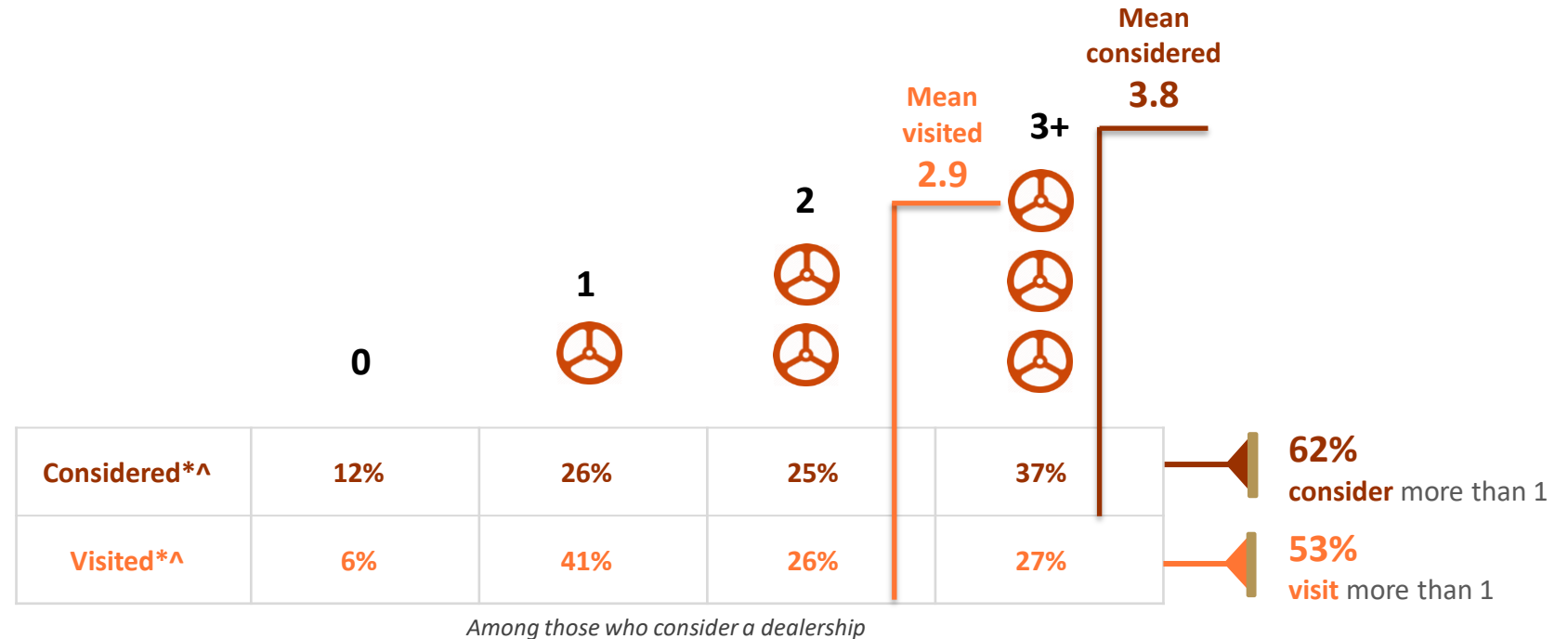
2.9

dealerships before making a purchase

and considers **3.8 dealerships**



General Auto-buying public





In summary

A lot has changed, but the need to take a test drive before buying has not. Despite the pandemic, market demand is strong – stronger than ever in cities with hesitation around public transportation. People are comfortable visiting dealerships but are more particular about where they go to test drive, so give them a reason to come to you.



Research Methodology

Urban Science Online Study – Oct. 2020

Continuing Through COVID: Are Consumer Buying Intentions Changing All That Much?

This survey was conducted online within the United States by The Harris Poll on behalf of Urban Science from October 27-29, 2020 among 2,025 U.S. adults age 18 and older. Figures for age, gender, education, income, race/ethnicity, region, size of household, marital status, and internet usage were weighted where necessary to bring them into line with their actual proportions in the population. This online survey is not based on a probability sample and therefore no estimate of theoretical sampling error can be calculated.

Urban Science Online Study - Dec. 2020

This survey was conducted online within the U.S. by The Harris Poll on behalf of Urban Science from December 4 – 7, 2020 among 2,043 U.S. adults ages 18 and older from which a natural fallout sample of 675 members of the new auto-buying public were analyzed. For the purposes of this research, the new auto-buying public is defined as anyone who purchased/leased a new vehicle within the past 2 years or plans to purchase/lease a new vehicle in the next 12 months.



Research Methodology

Urban Science and Harris Poll Joint Study

Around the Bend: How COVID-19 Impacts the Next Normal for Dealers

This survey was conducted online within the United States by The Harris Poll in partnership with Urban Science from June 2-9, 2020 among 1,505 adults age 18+. Results are weighted to be representative of this population. This online survey is not based on a probability sample and therefore no estimate of theoretical sampling error can be calculated.

Urban Science COVID Dealer Survey

This survey was conducted online within the U.S. by Urban Science from July 1-August 5, 2020 to understand the impact to dealers from the pandemic and how dealerships are adapting and responding, adjusting, and planning how to best operate to fulfill the needs of consumers and remain a successful business. Survey responses were evaluated for margin of error at 90% confidence level.