



# **The Uncertain Future of Auto:** *A Swerving Path Through Unprecedented Disruption*

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Slides 17 – 20 cover shopping behaviors of consumers, including what type of car they plan to purchase next and how they shop for cars

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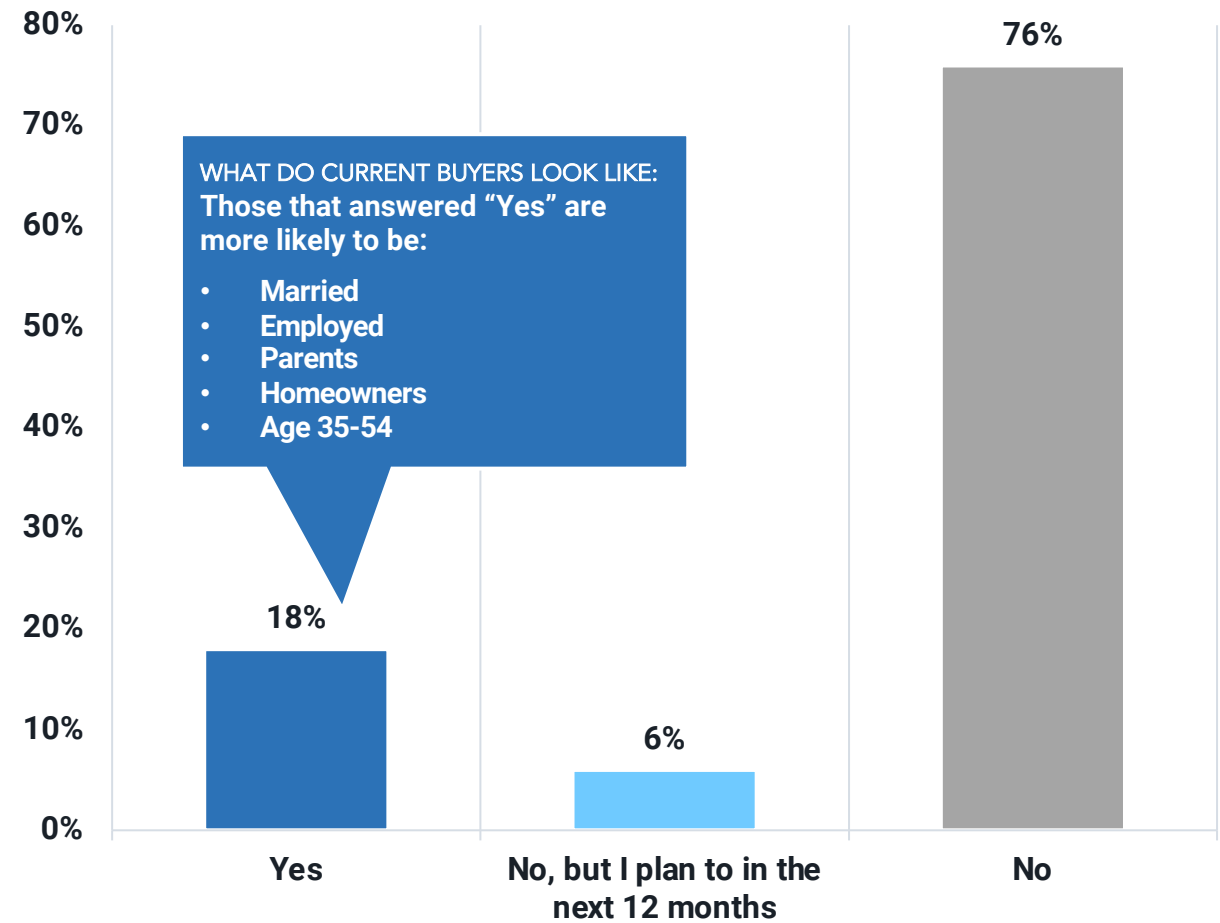
Slides 21– 25 report on how radio can impact the auto category, and its reach

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# 18% of Consumers Purchased a New Car in the Last 12 Months

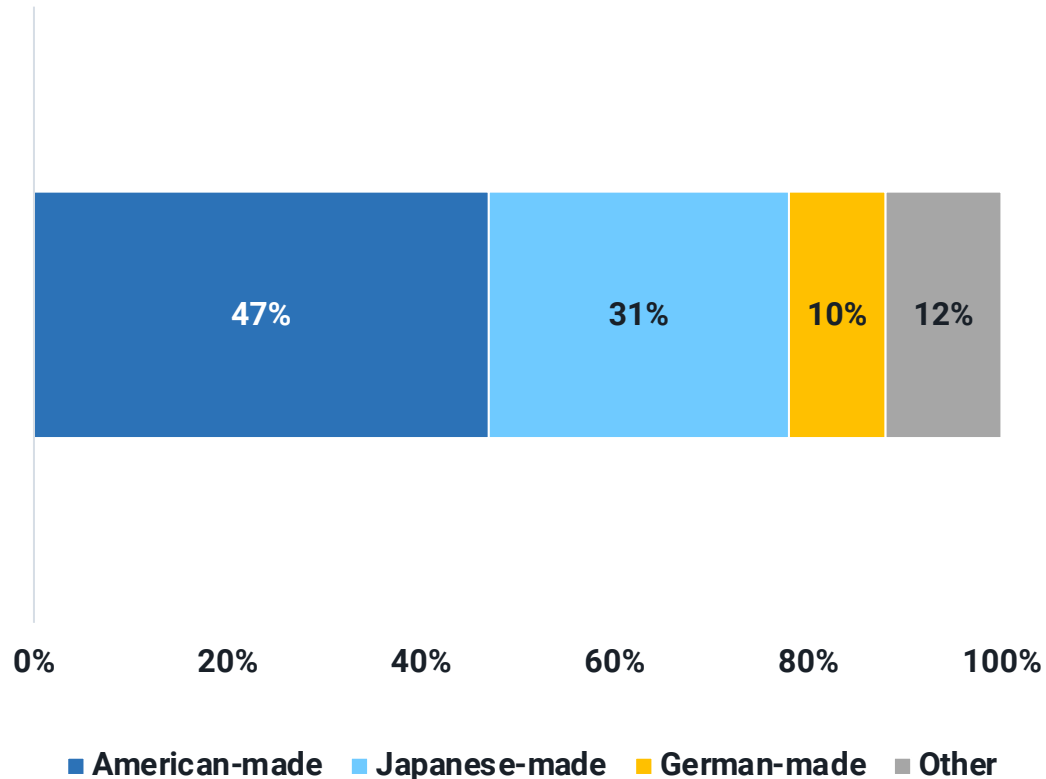


108,613 responses from 03/01/2021 to 02/28/2022

# US adults choose American-made cars most, but Japanese closely follows, with significant differences among these drivers



What type of car do you typically drive?



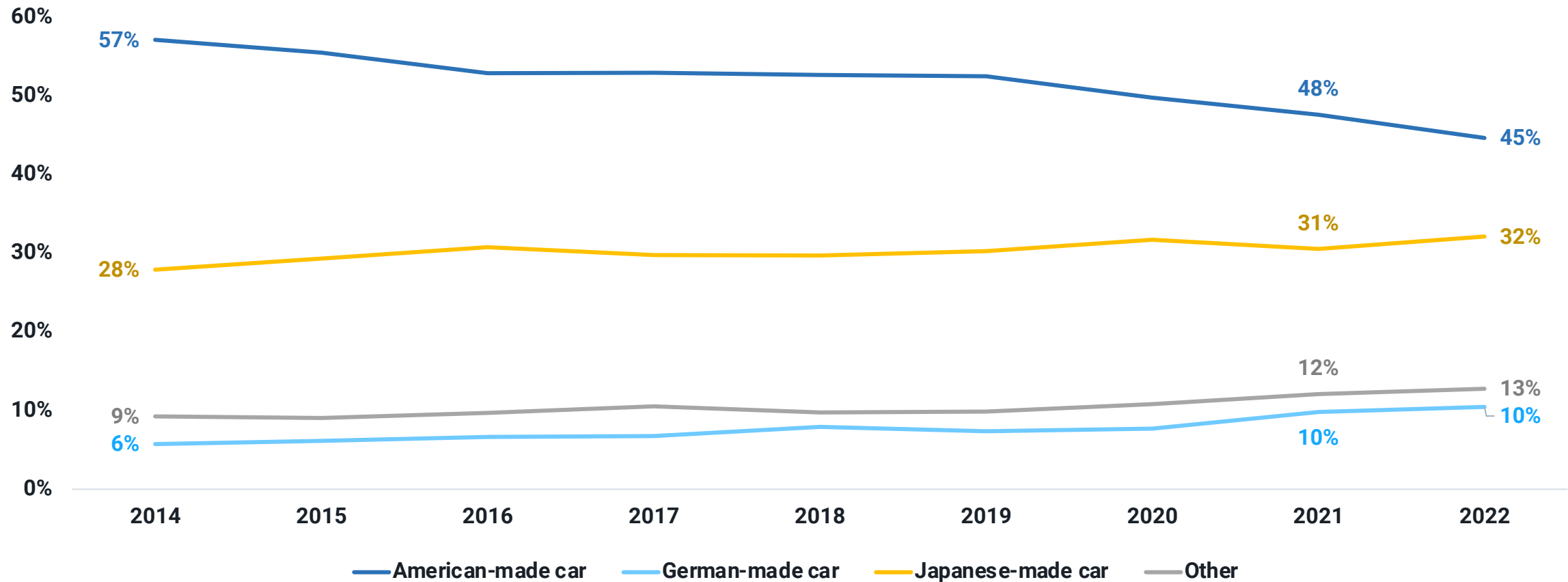
	American-made car drivers	Japanese-made car drivers
<b>Key Demos:</b>		
Age 18-29	13%	<b>22%</b>
Black	8%	<b>13%</b>
Married	<b>57%</b>	48%
Republican	<b>38%</b>	28%
<b>Primary influence on purchasing behavior:</b>		
Ads TV	<b>49%</b>	42%
Comments/recommendations on social media	31%	<b>36%</b>

51,921 responses from 03/01/2021 to 02/28/2022



# Over the years, there has been a steady decline in American-made car drivers

What type of car do you primarily drive?

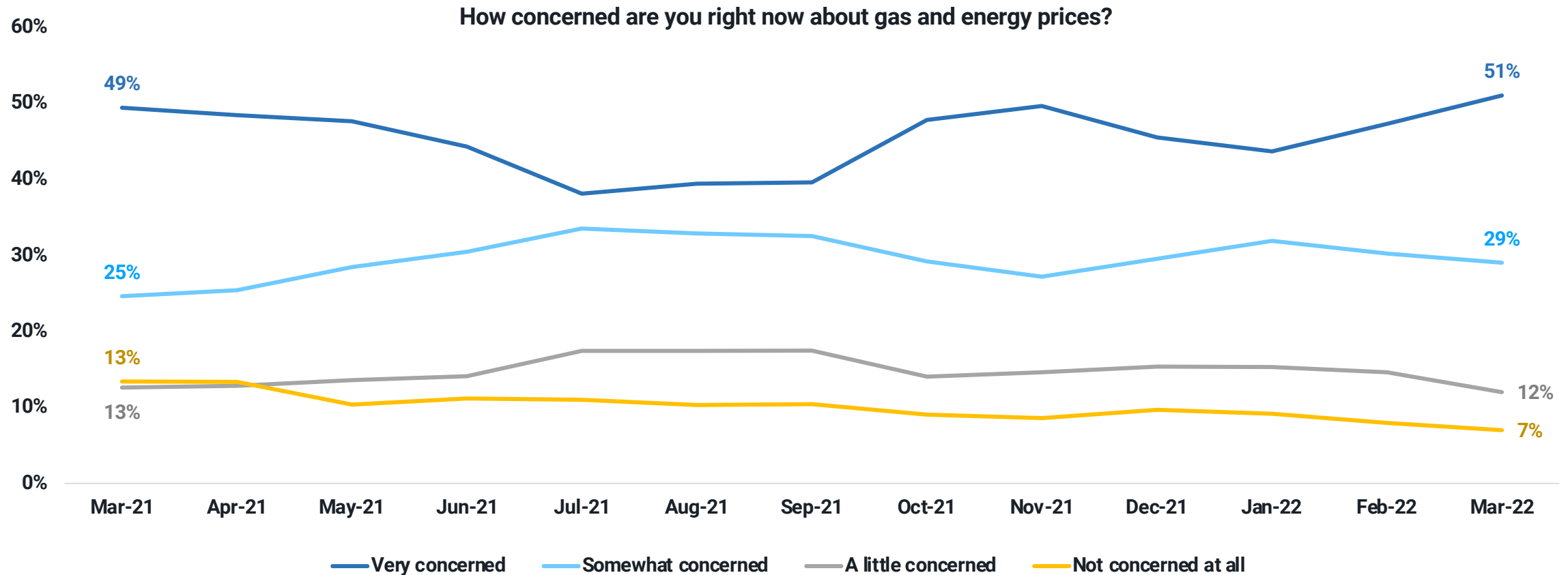


51,921 responses from 03/01/2021 to 02/28/2022



# Currently, half of US adults are showing serious concern over rising gas and energy prices

Sentiment around gas prices could have a significant effect on the types of cars consumers purchase... particularly their consideration for an electric vehicle. See [slide 10](#) for additional details on electronic vehicles purchase intent

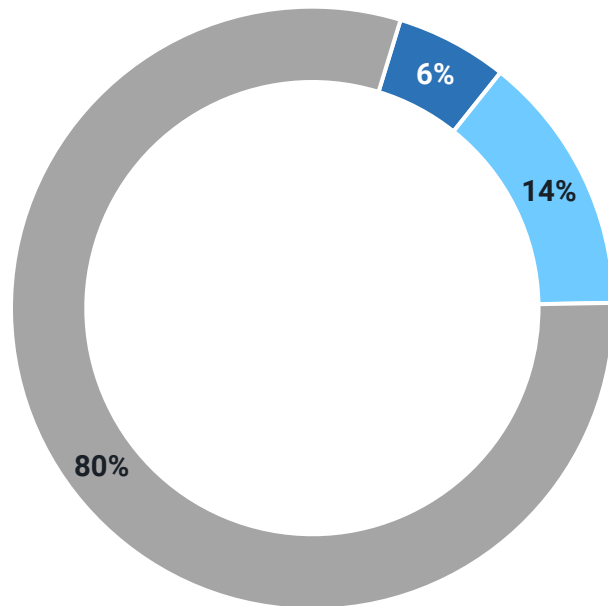


139,268 responses from 03/01/2021 to 03/16/2022



# One-in-five US adults express some intent to buy or lease a new car in the next 90 days

How likely are you to buy or lease a NEW car in the next 90 days?

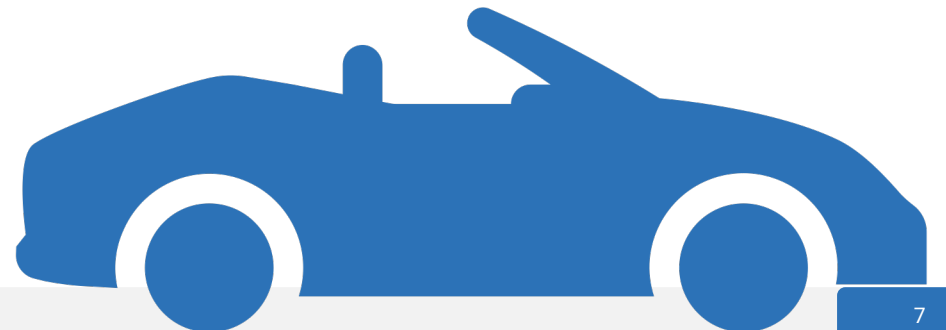


■ Very Likely ■ Somewhat likely ■ Not at all likely

WHAT DO PROSPECTIVE BUYERS LOOK LIKE:

People who answer Likely (Very/Somewhat) are...

- More than **twice** as likely to be 18-34 years old
- **5x** as likely to dine regularly at upscale restaurants
- **Twice** as likely to be fans of travel, home, and cooking TV shows
- **Twice** as likely to follow music trends

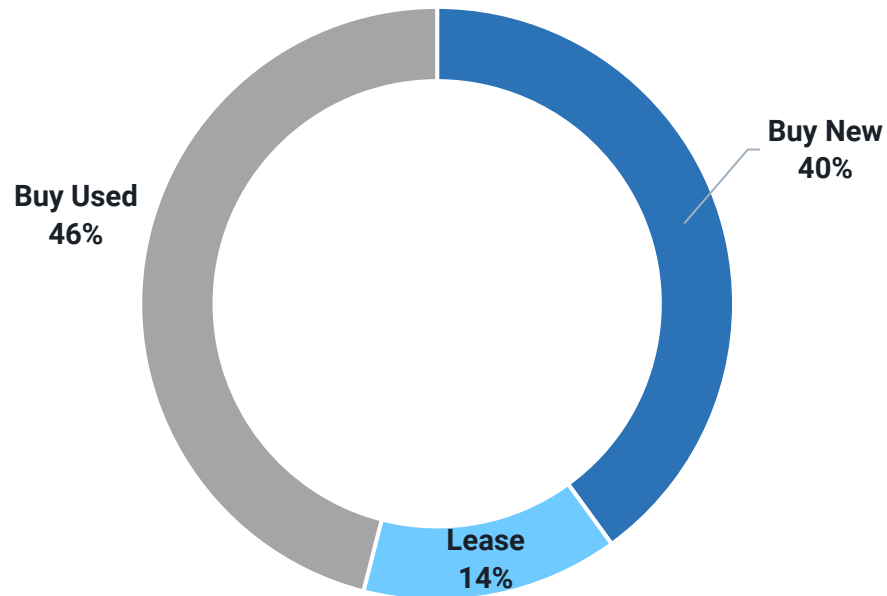


135,756 responses from 03/01/2021 to 02/28/2022

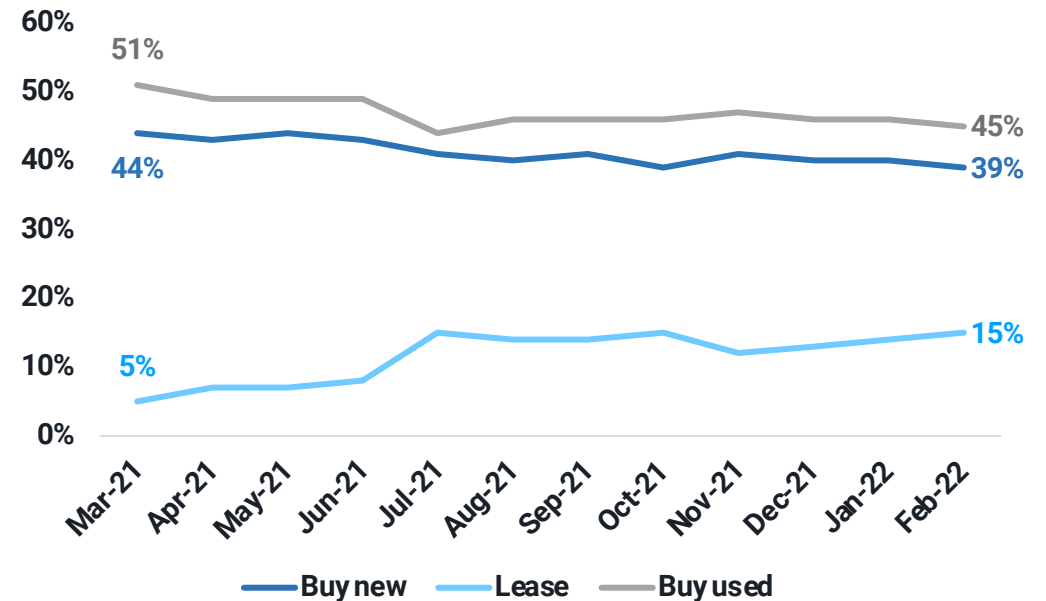


# Those planning to lease have increased 10 percentage points in the past 12 months

Despite headwinds facing the auto leasing business (i.e., supply shortages, inflated prices, less features) consumers are still considering a lease for their next purchase. This is being driven mostly by younger consumers (age 18-34).



For your next car purchase, are you most likely to...



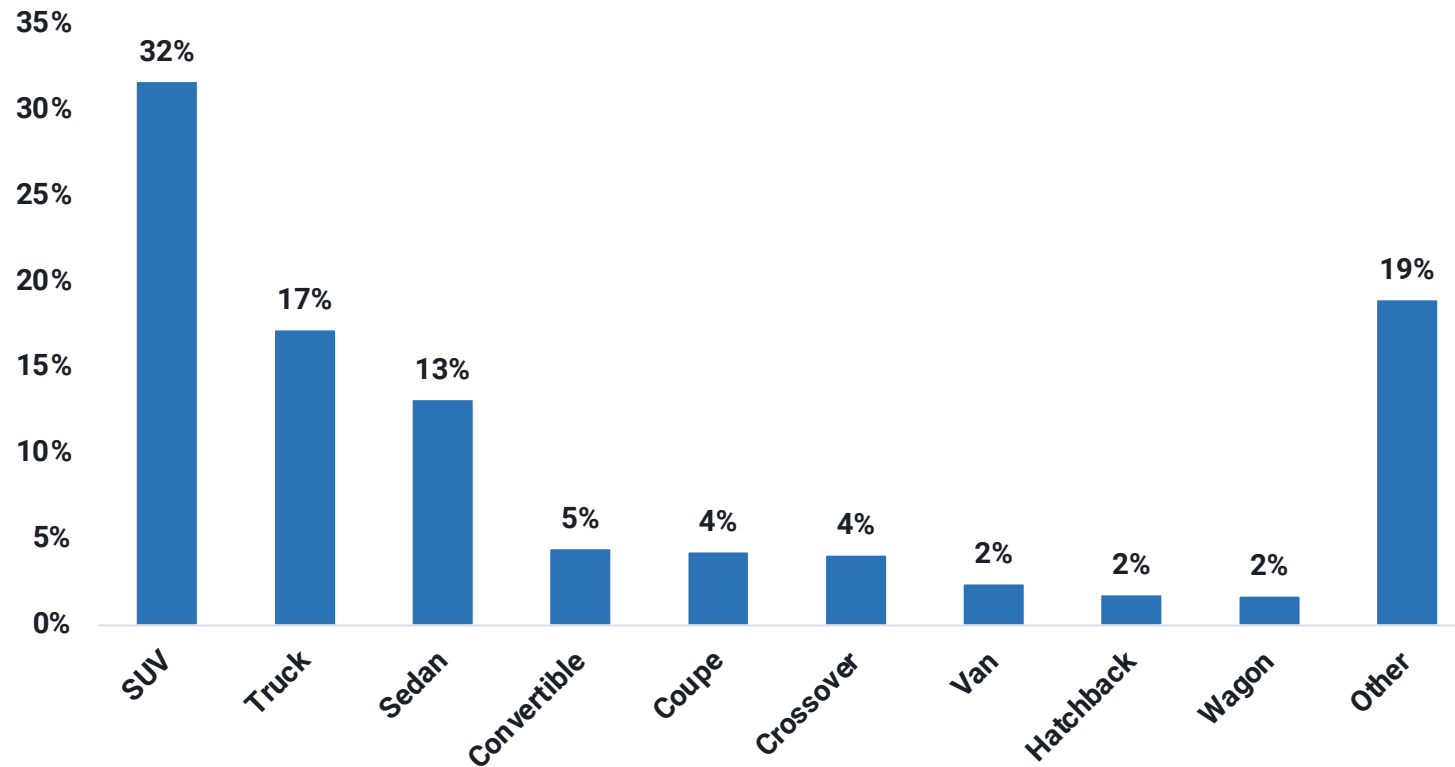
102,591 responses from 03/01/2021 to 02/28/2022



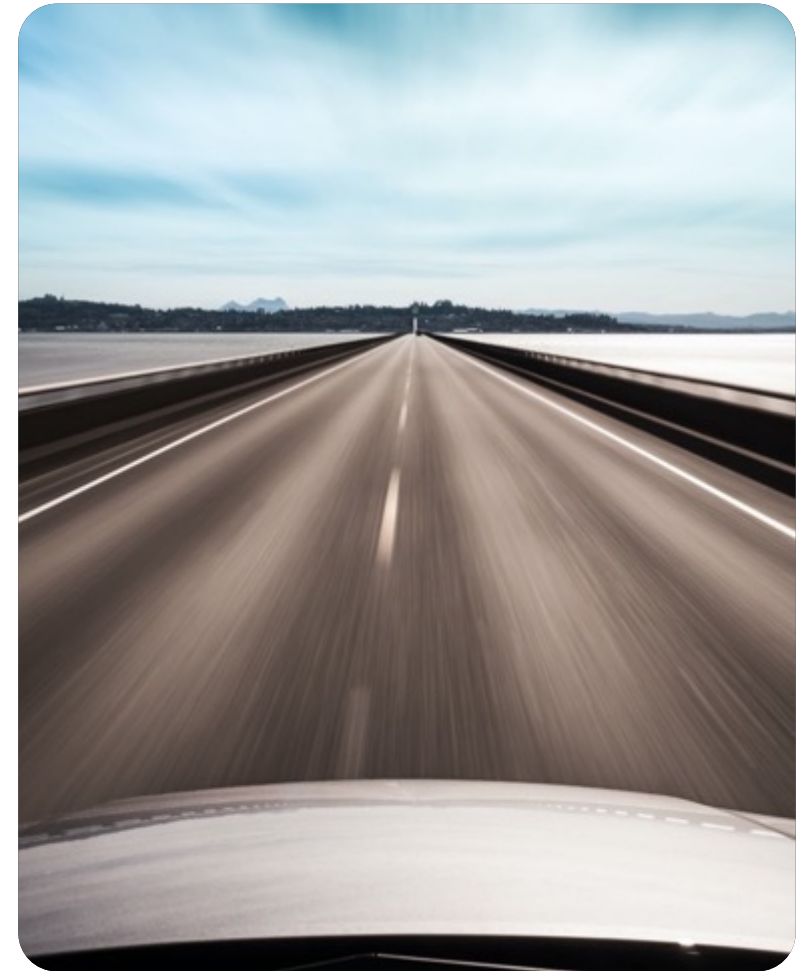
# Consumers are going BIG with their next purchase...nearly half say they are most likely to purchase an SUV or truck



What type of car are you most likely going to purchase next?

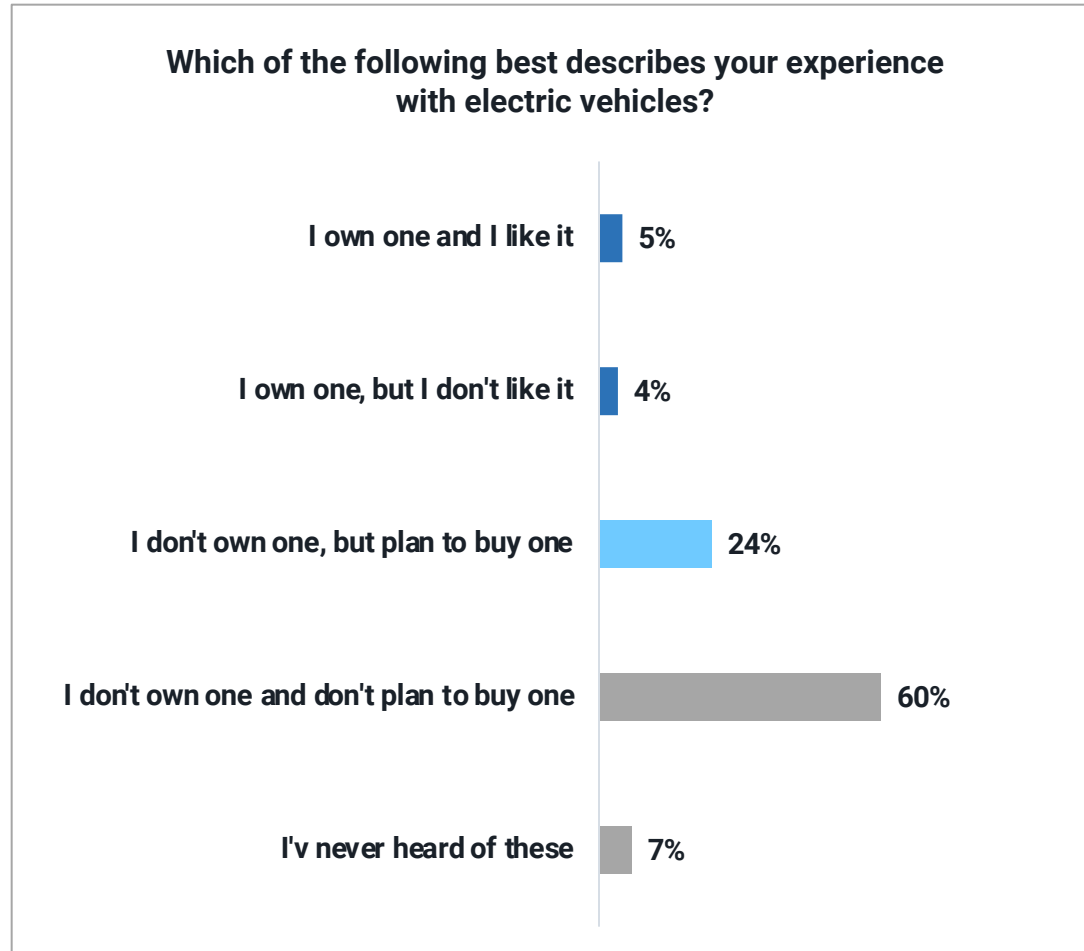


127,282 responses from 03/01/2021 to 02/28/2022

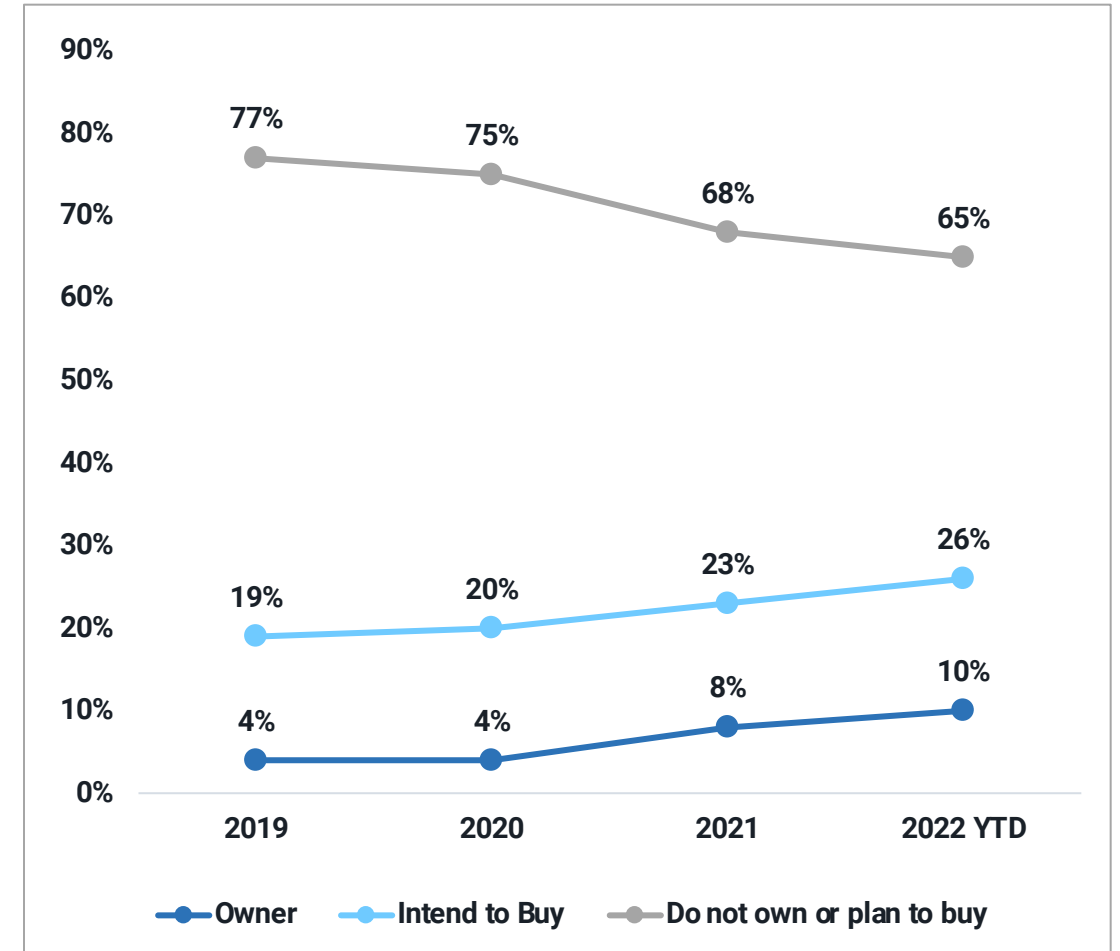




# One-in-four US adults say they plan to buy an electric vehicle



63,353 responses from 03/01/2021 to 02/28/2022

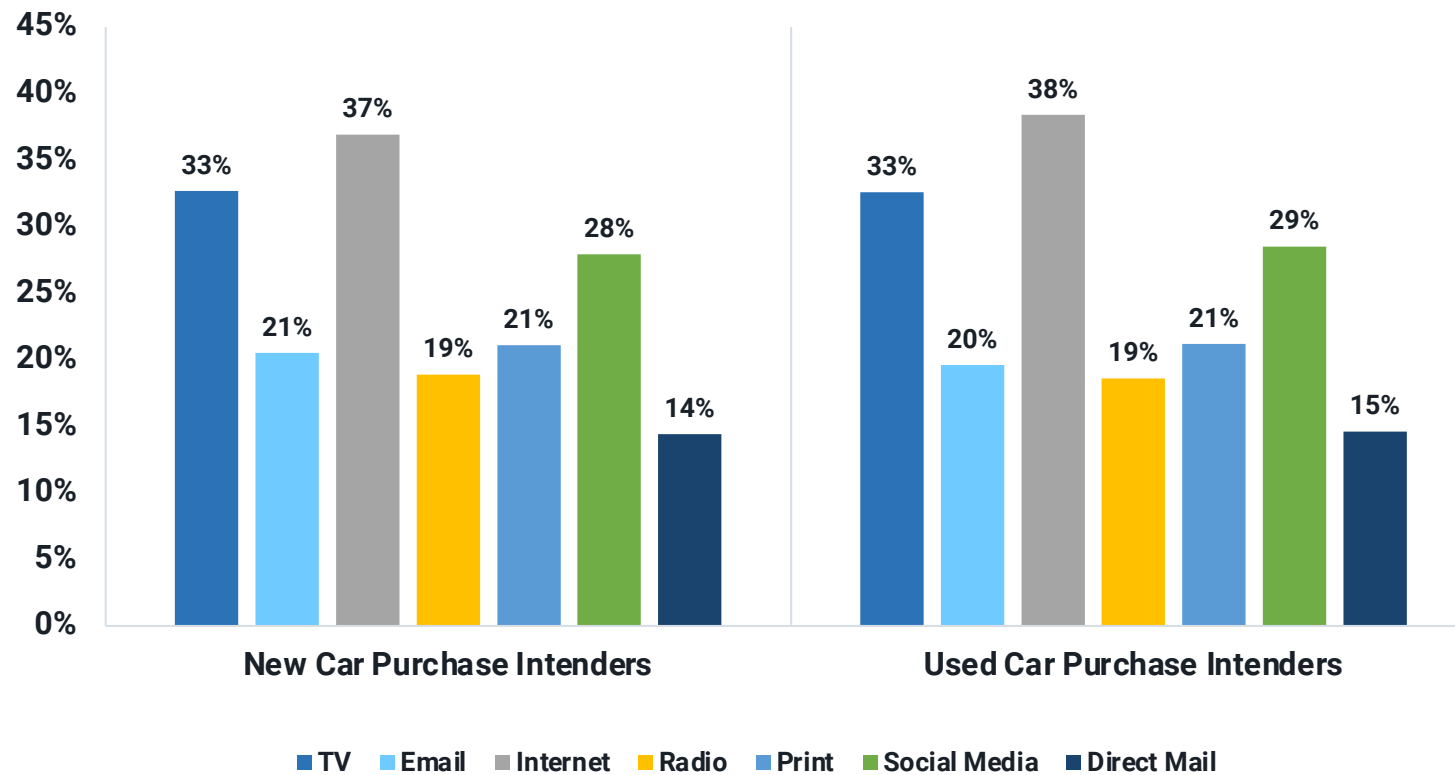


162,720 responses from 07/30/2019 to 03/16/2022



# Car purchase intenders are most influenced by TV, internet, and social media advertising

Advertising that most influences purchase decisions among those that are likely (very/somewhat) to purchase a new or used car in the next 90 days



6,373 new car purchase and 6,555 used car purchase intenders responses from 03/01/2021 to 02/28/2022

# CivicScience data can provide insights into even the minutest segments of the market



*Among those that say technology/innovation (2% of the market) is most important when purchasing a car:*

- 65% are men
- 2-out-of-5 are age 35-54
- 53% are high earners (\$100K+)
- One-in-four have a graduate or professional degree
- 51% live in the suburbs
- Shopping Habits:
  - Early adopters
  - They tell others about new brands and technology
  - Brand is more important than price when it comes to food and clothing

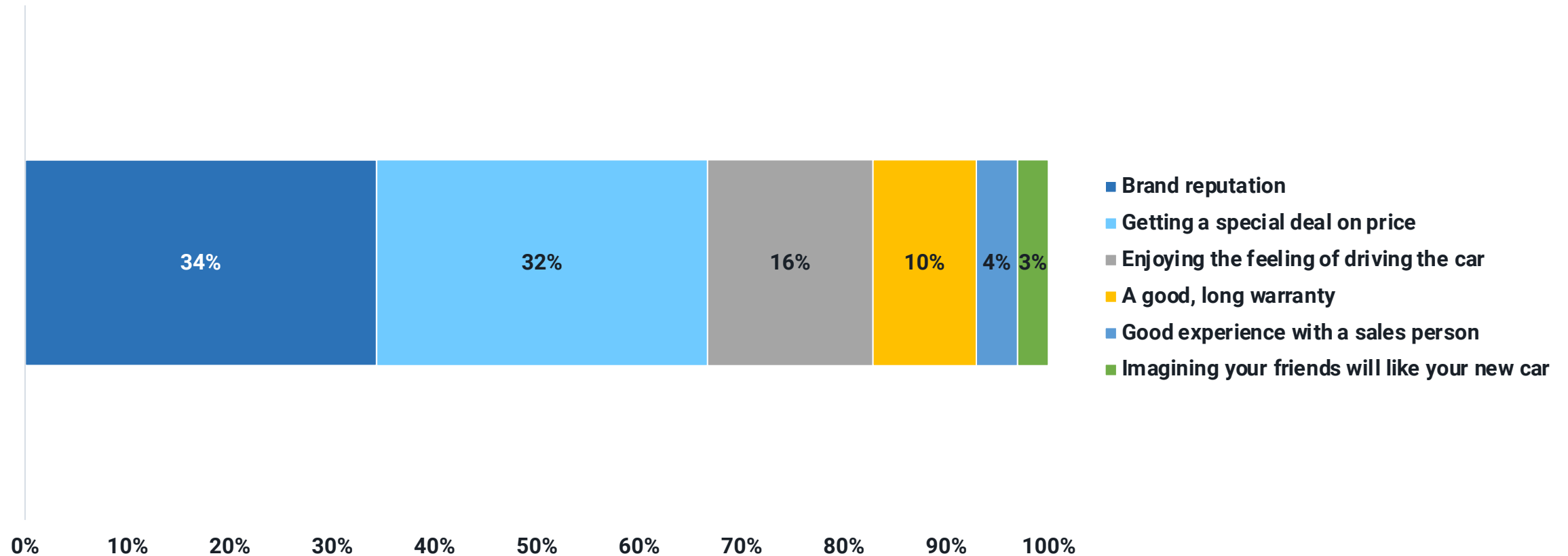


2,122 responses from 03/01/2021 to 02/28/2022



# When shopping for a new car, brand reputation is the leading motivator to buy

When you shop for a new car, which factor most motivates you to buy?

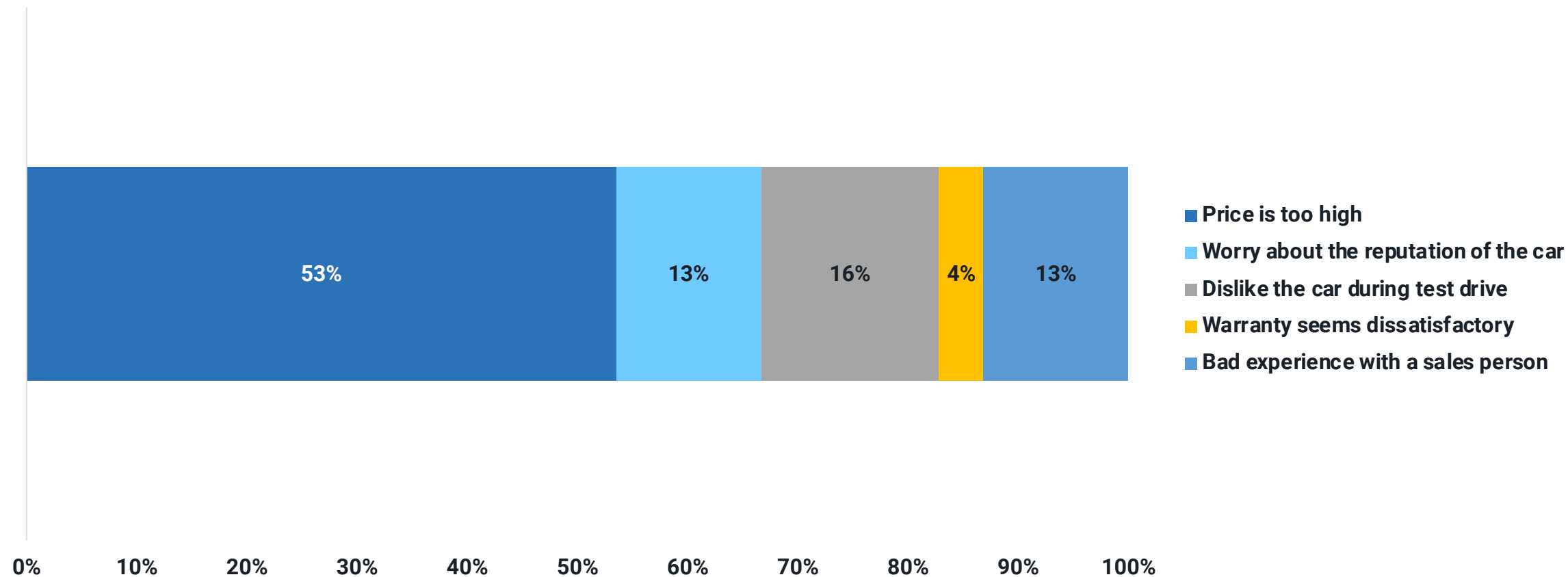


105,691 responses from 03/01/2021 to 02/28/2022



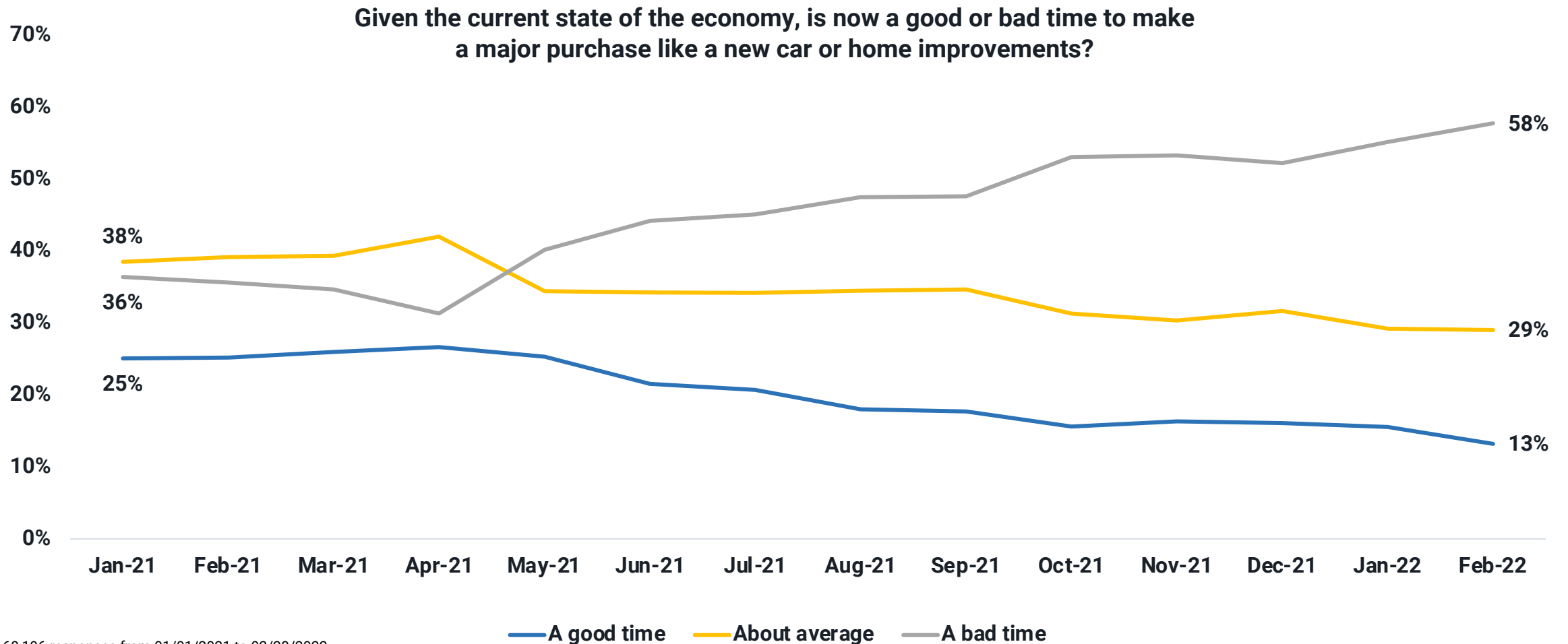
# While brand is the main factor for purchasing, price is the leading deterrent

When you shop for a car, which factors most causes you to NOT buy?



111,464 responses from 03/01/2021 to 02/28/2022

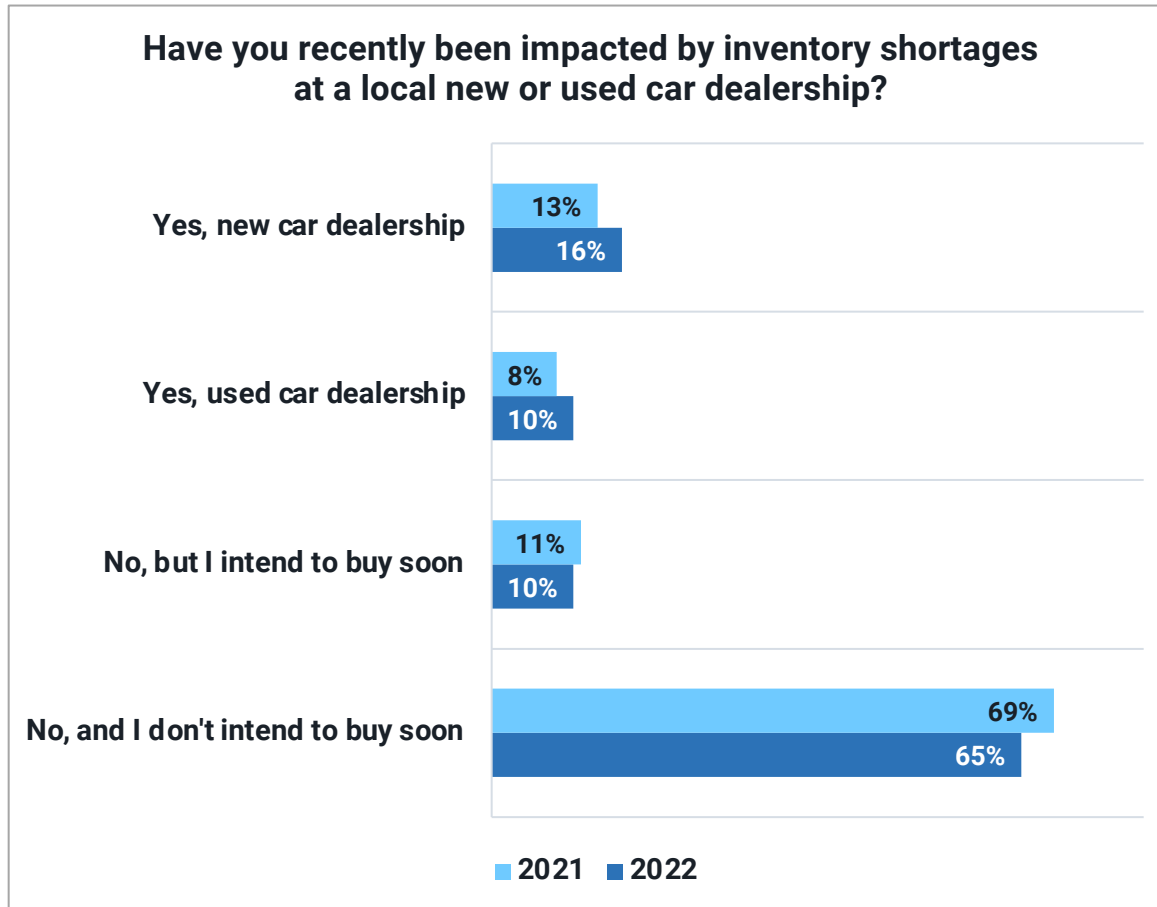
# The current state of the economy has also had a major impact on consumers' sentiment towards making large purchases



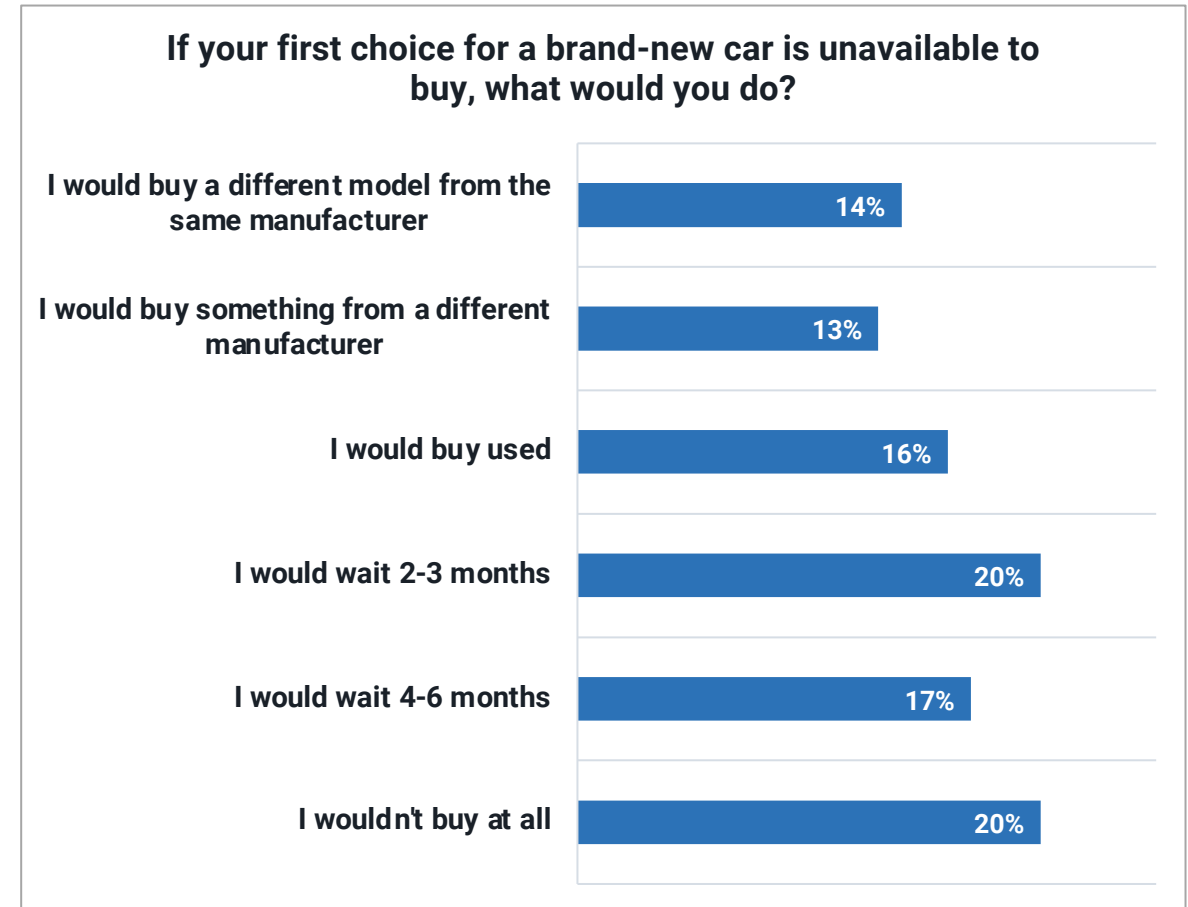
68,196 responses from 01/01/2021 to 02/28/2022



# Beyond major purchase aversion, supply chain shortages continue to impact the auto industry



2,693 responses from 02/24/2022 to 02/28/2022 (Feb 2022)  
 2,837 responses from 10/27/2021 to 11/03/2021 (Oct/Nov 2021)  
 Excludes responses to "Other/Does not apply"



68,612 responses from 12/01/2021 to 02/28/2022

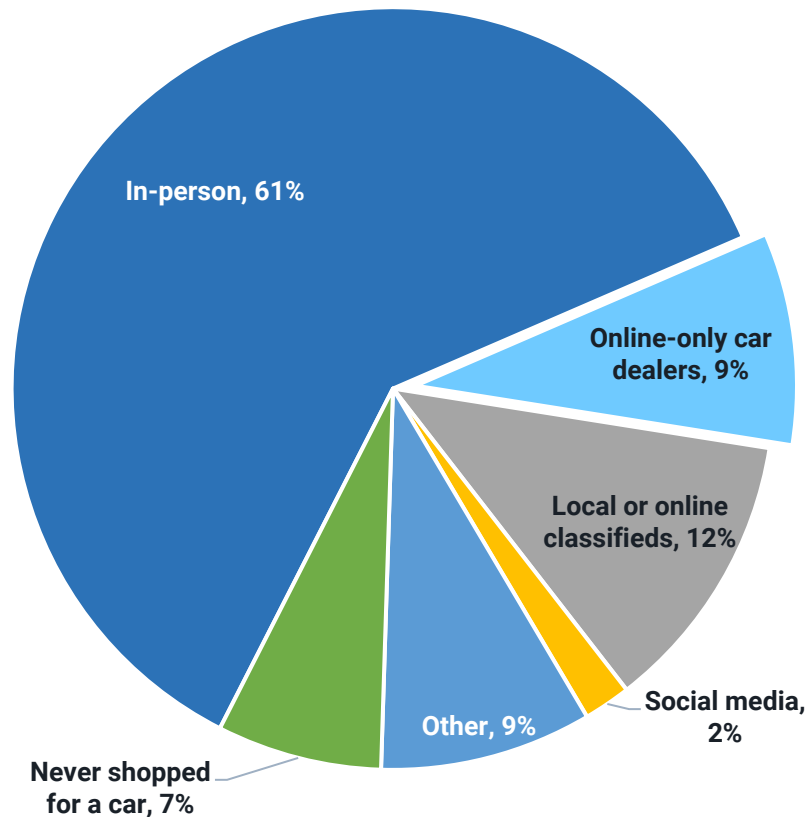




# When it comes to car shopping, 6-in-10 typically shop in-person, but online car dealers are growing in popularity

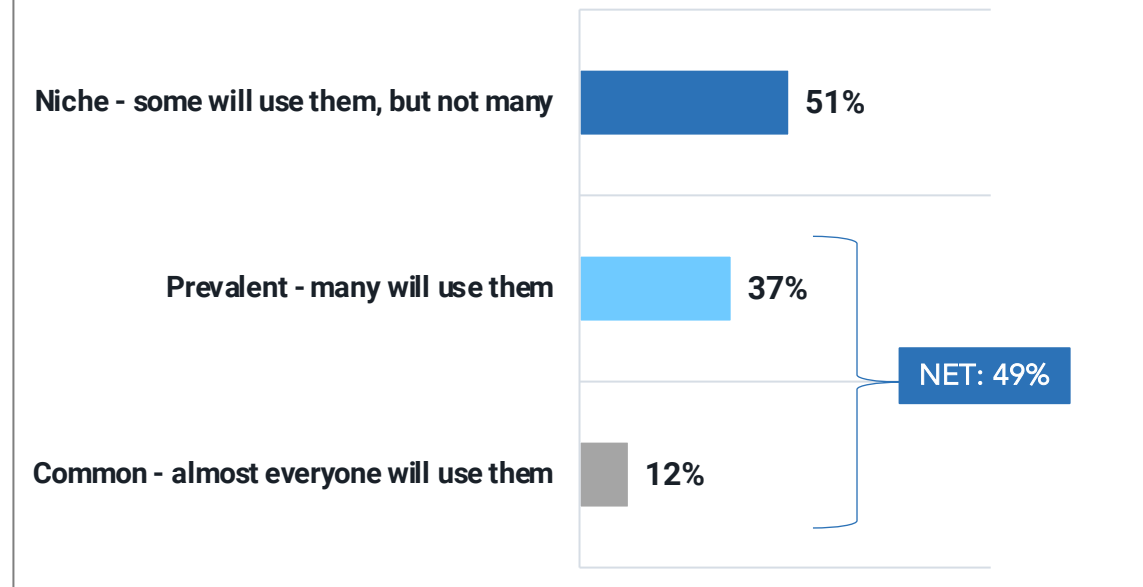
Nearly half think they will be prevalent/common in the next few years

How do you typically shop for vehicles?



3,137 responses from 03/07/2022 to 03/07/2022

How popular do you think online car dealers (such as TrueCar, Carvana, and CarMax) will become in the next few years?

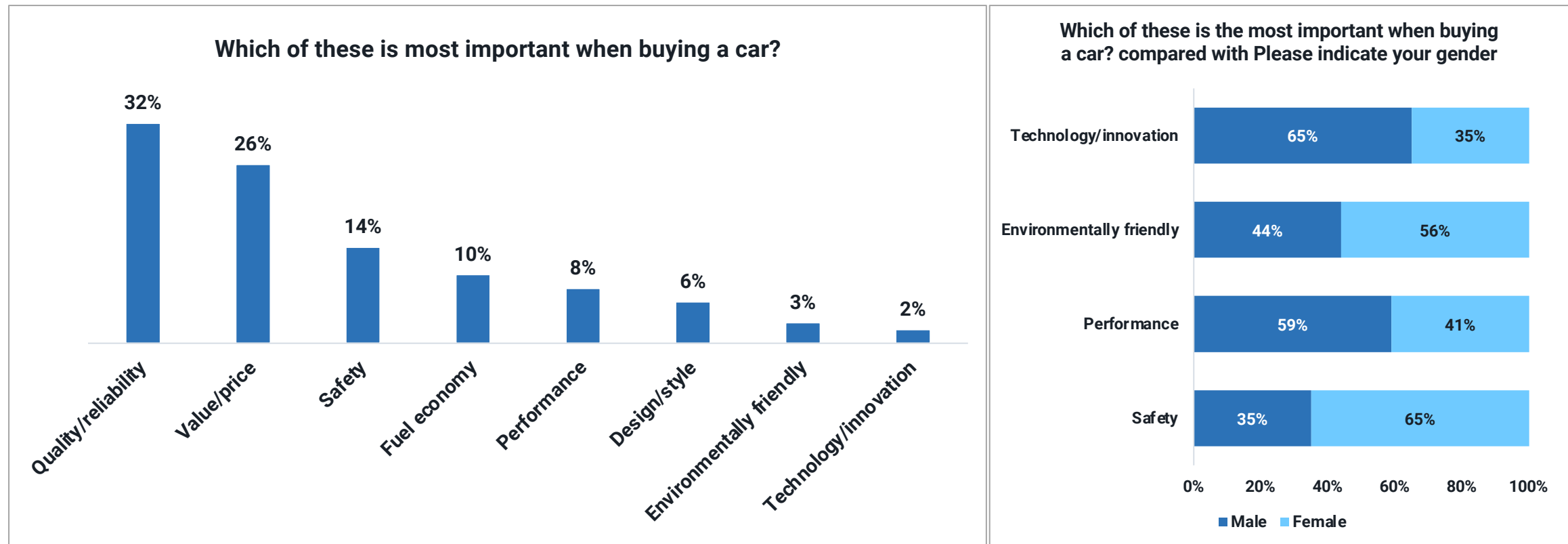


127,666 responses from 03/01/2021 to 02/28/2022



# Unsurprisingly, quality and price are most important to consumers when buying a car...

But there are important distinctions among consumer groups. Looking just at gender, we see significant differences in what they believe important. These discrepancies are apparent across multiple demographic traits, including age, political affiliation, and parental status.

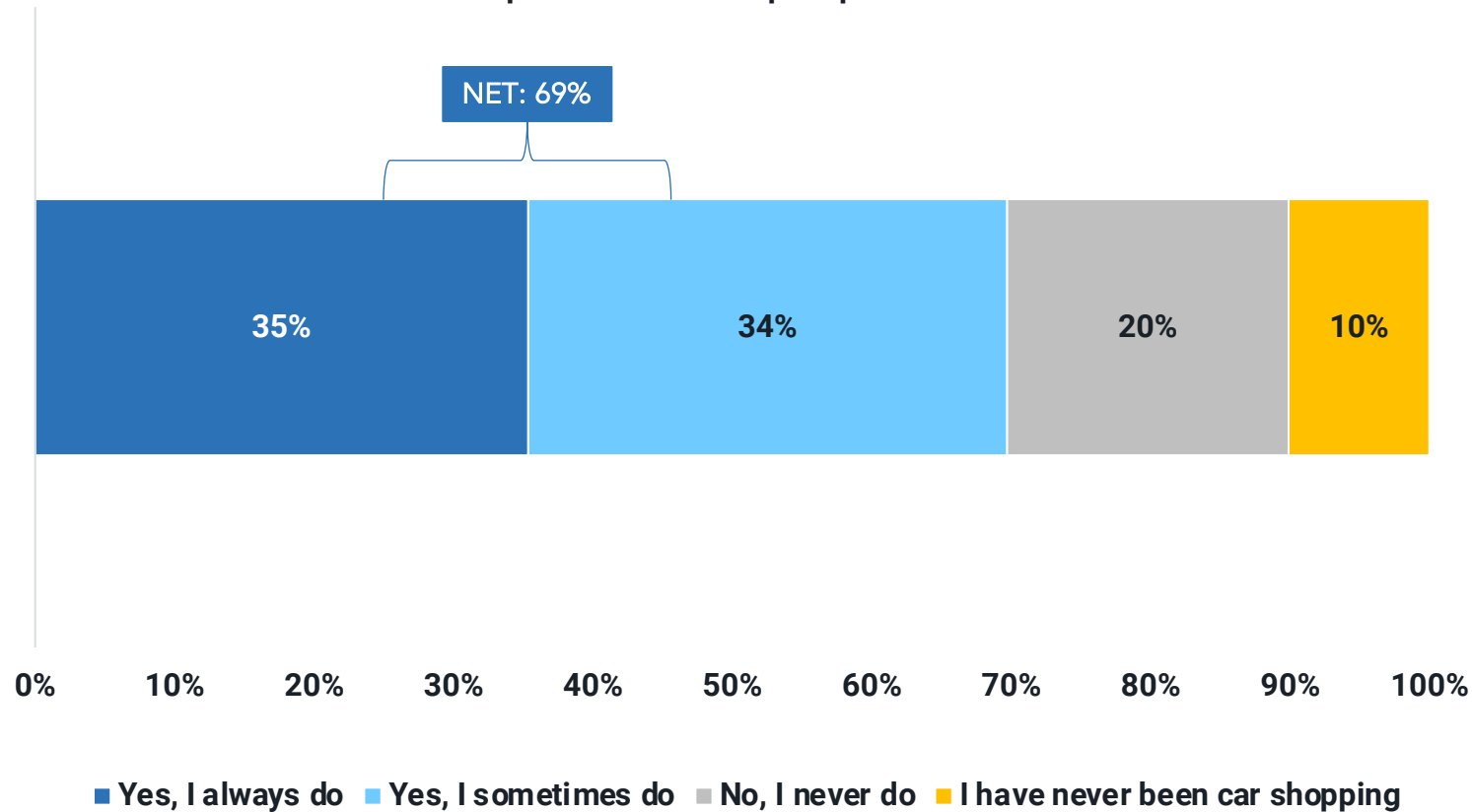


118,418 responses from 03/01/2021 to 02/28/2022

# With price being so important, most consumers do price comparisons across multiple dealers



When shopping for a car, do you go to multiple dealers to compare prices?



222,818 responses from 03/01/2021 to 02/28/2022

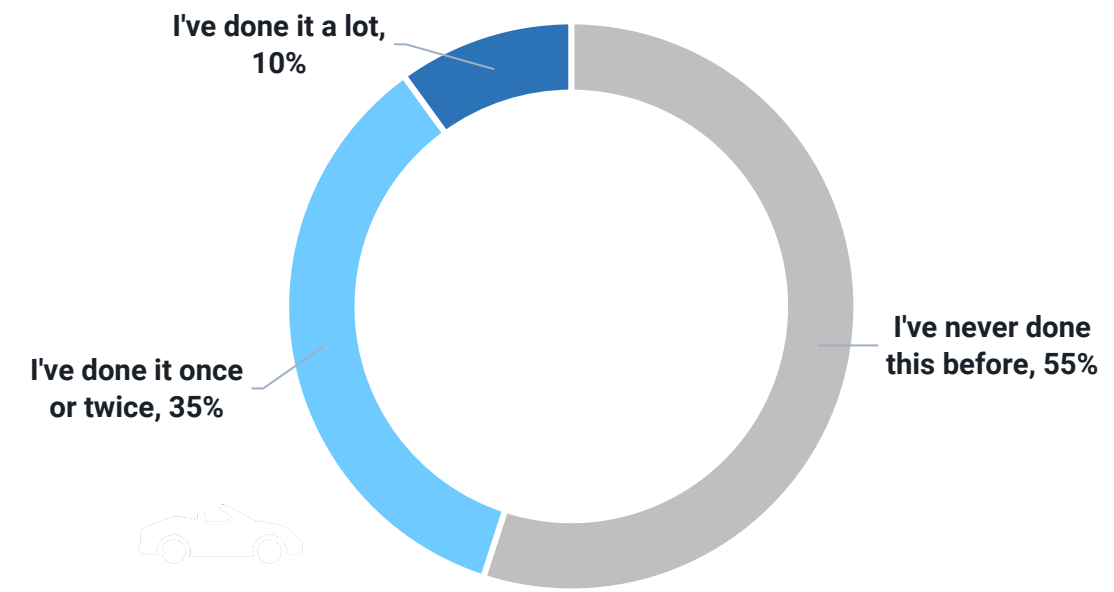


# Getting consumers in the door isn't always enough...



Nearly half of consumers have gathered info from one dealership and went on to purchase from another

Have you ever gone to one dealership to test drive and gather information about a car, then purchased it from another dealership?

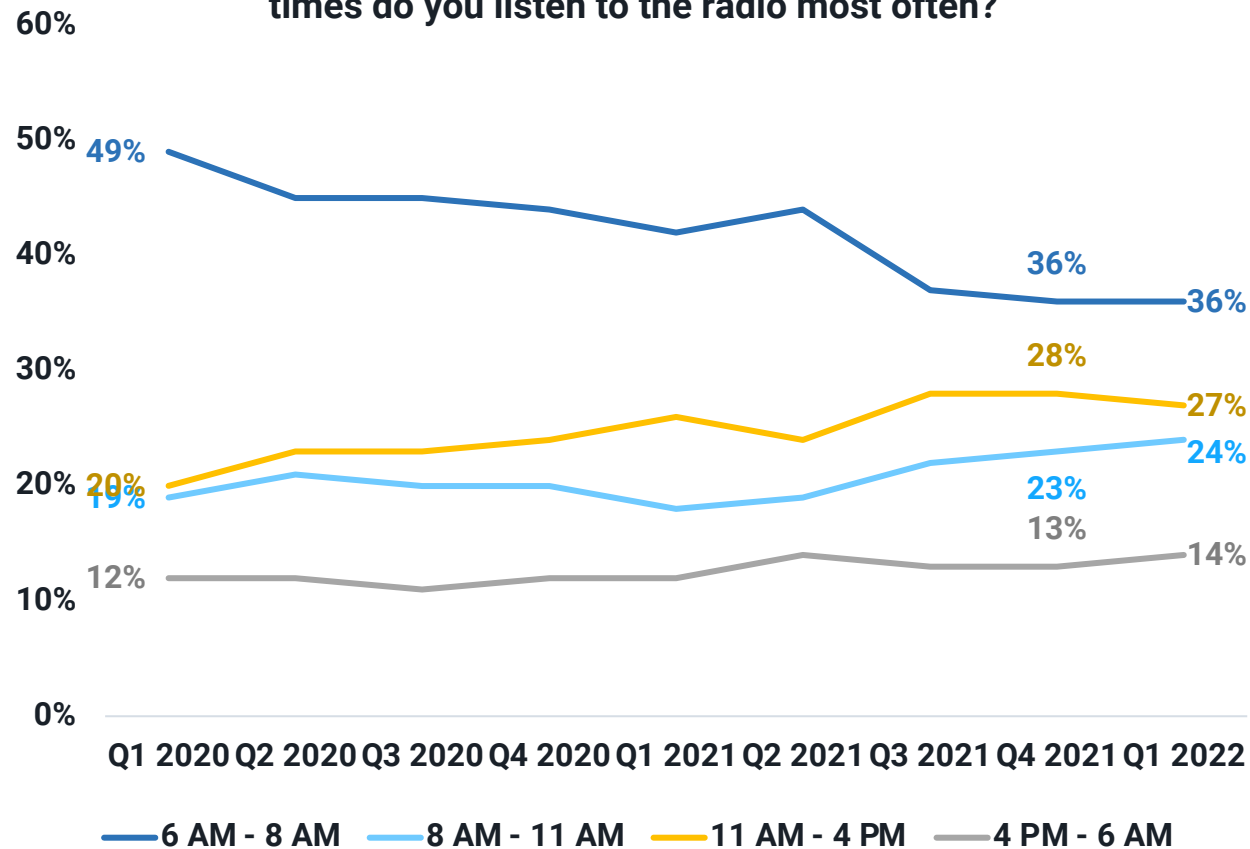


126,434 responses from 03/01/2021 to 02/28/2022

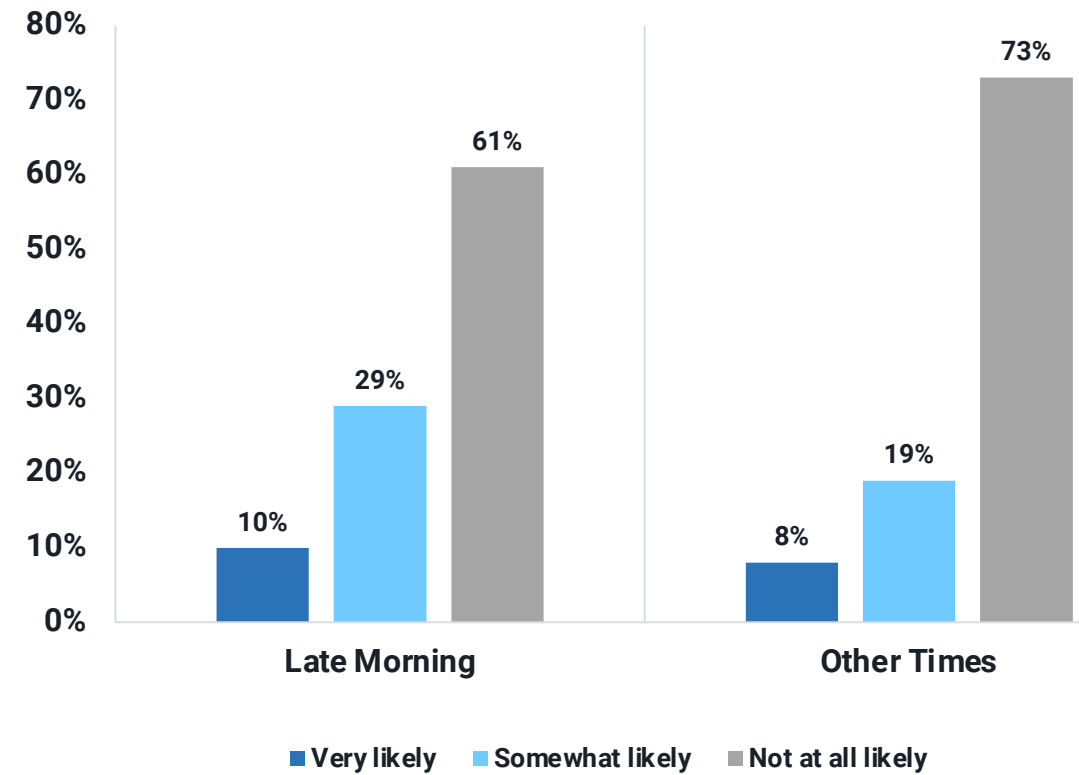


# As consumer habits shifted during the pandemic and commuting decreased, radio listening shifted from early morning to late morning. And that's when auto buyers are listening

On an average weekday, during which of the following times do you listen to the radio most often?



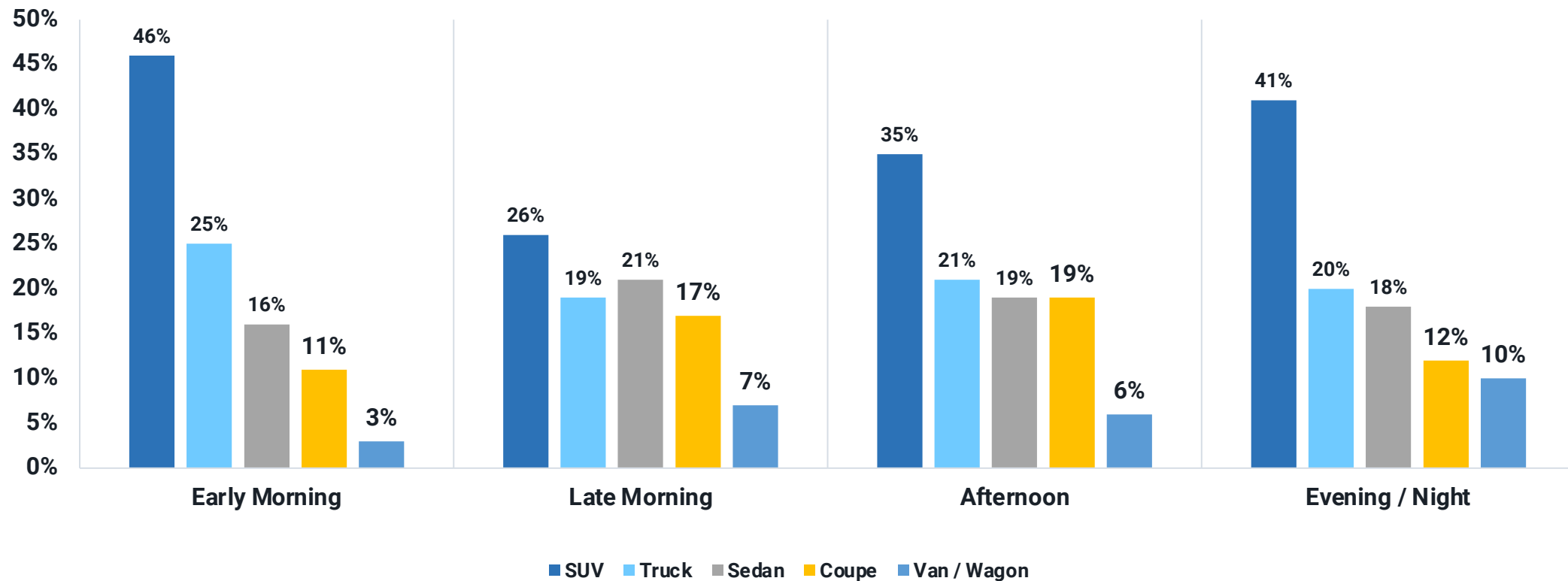
Likelihood to buy a car in the next 90 days by Radio Time





**Time of day matters: the different times consumers listen is also indicative of their lifestyle, which tends to be indicative of the types of cars they want to buy.**

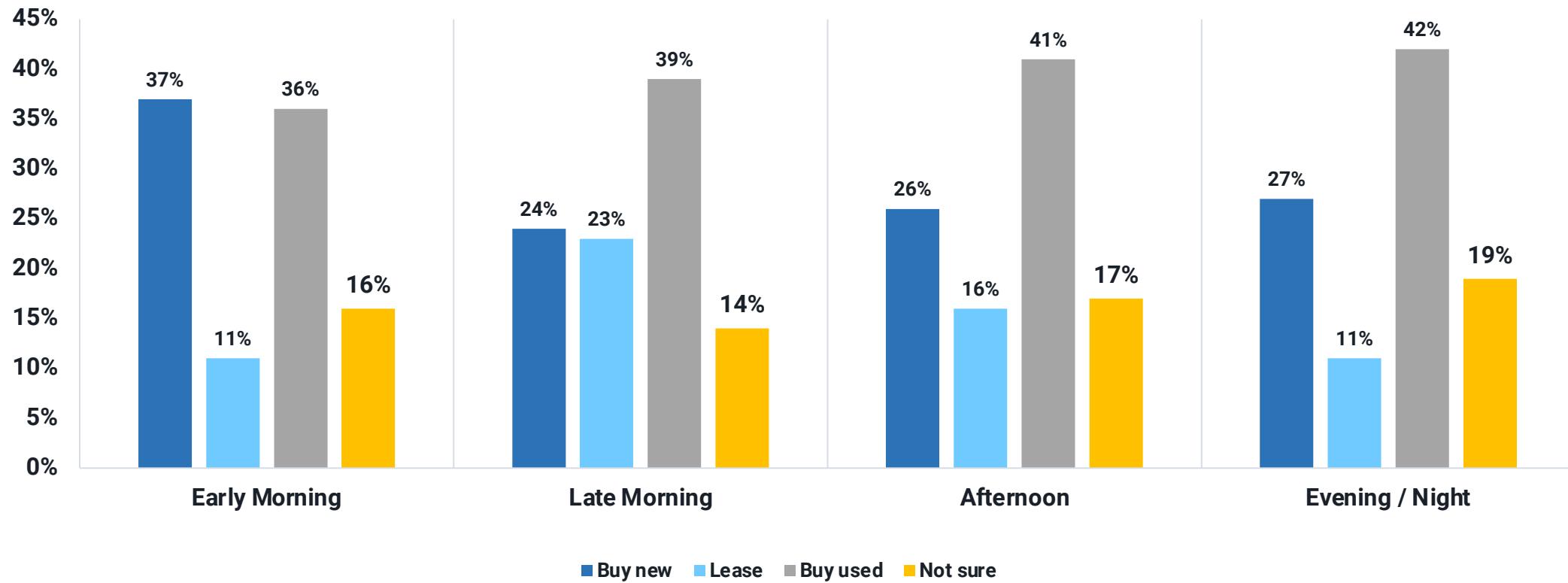
**Likely Next Car Style  
By Radio Time**





The same is true of *what type of purchase they're seeking*. Early morning consumers tend to be more affluent and concerned with style, so they want to buy new. The rest of the day is more of a toss up.

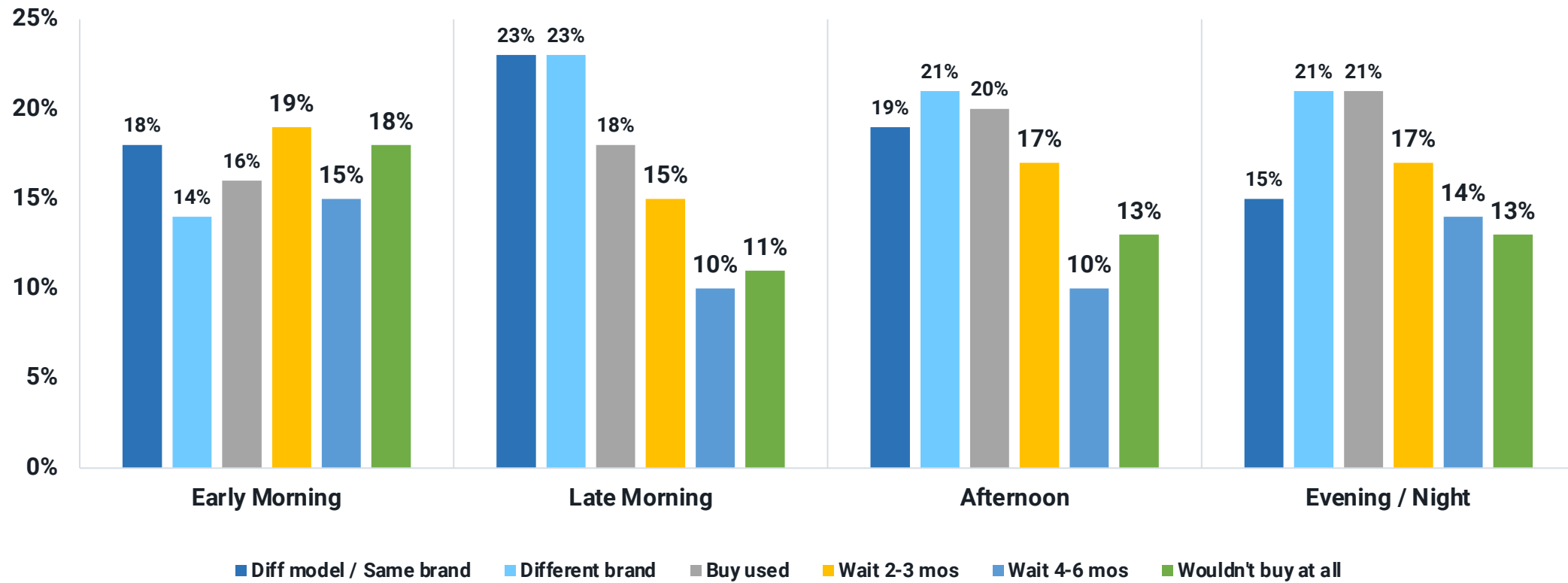
Likely Next Type of Car Purchase  
By Radio Time





Finally, time of day can tell you who is in the market more urgently: early morning listeners will wait for the car they want. Other times of day are more open to buying what's on the lot.

Likely Next Type of Car Purchase  
By Radio Time







# Key Takeaways

# Summary findings

- Current Ownership
  - 18% of consumers purchased a new car in the last 12 months
  - Consumers drive American-made cars over Japanese-made cars, but American-made cars are on the decline
- Purchase Intent
  - Nearly half (49%) of consumers plan to purchase an SUV or truck as their next car
  - Consumers are more likely to buy a used than a new car next
  - 20% express intent to buy or lease a new car in the next 90 days
- Purchase Detractors
  - Nearly 6-out-of-10 consumers believe now is a bad time to make major purchases
  - Price is the leading reason purchases are not made
- Purchase Motivators
  - Brand Reputation and Special Deals are top motivators to purchase
  - Quality/Reliability ranks highest for what is most important in buying a car
- Shopping Behaviors
  - Only 20% of consumers fail to do price comparisons across multiple dealers
  - 61% of consumers shop in person for vehicles
- The Role of Radio
  - Listening shifted to later morning, which aligns with when auto intenders are most actively listening.
  - Time of day acts as a proxy for the type of person who listens, which also corresponds to the type of car they want.
  - Time of day also acts as a proxy for what consumers want to hear about the cars they're shopping for



**For more information on the auto brands we track, click the link below.**

[Auto Brand Affinity Dashboard](#)



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# 2021-2022 Auto Industry Dashboard:

CivicScience - Dashboard – Industry Report – Auto 2021-2022

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