



News Release

Embargoed Until April 15, 12:01 a.m. ET

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NIELSEN: 65 PERCENT OF GLOBAL ONLINE CONSUMERS PLAN TO BUY A NEW OR USED CAR IN THE NEXT TWO YEARS; ONLINE ADVERTISING AND INFORMATION MOST HELPFUL FOR BUYERS

Eighty-four Percent of Global Survey Respondents Say Love of Driving is Motivator for Car Purchases; Utility and Status Intentions Also Influential

NEW YORK – Embargoed Until April 15, 12:01 a.m. ET – Sixty-five percent of global online consumers across 60 countries plan to buy a new or used car in the next two years, according to a new study by Nielsen, a leading global provider of information and insights into what consumers watch and buy. Auto demand will be strongest in Latin America (75%), Middle East/Africa (75%) and Asia-Pacific (72%), while more than half of North Americans (56%) and half of Europeans (50%) expect to buy a new or used car in the next 24 months.

“Linking global automotive demand with consumer sentiments and media habits is vital to developing marketing strategies that connect the right consumers with the right automotive brands,” said Pat Gardiner, president of Nielsen Automotive. “The Asia-Pacific and Latin American regions, as expected, represent large areas of growth opportunity for the industry, but capturing this opportunity hinges on marketers successfully identifying, understanding and effectively connecting with buyers’ needs and desires. Online platforms, in particular, present unique opportunities to reach these buyers.”

The Nielsen Global Survey of Automotive Demand polled more than 30,000 Internet respondentsⁱ in 60 countries to identify where automotive demand is greatest and to reveal the emotional as well as the financial motives that are most influential in driving new and used car purchase intent. The findings are integrated with an 11-country media consumption study to uncover the media platforms where automotive advertising resonates most strongly and which websites can be most helpful for car-buying consumers.

New car purchase intent is strongest in Asia-Pacific, where 65 percent of respondents say they will buy new in the next two years, compared with 7 percent who plan to buy used cars. In Latin America,

47 percent of respondents say they will buy a new car, while 28 percent plan to buy used. Similar ratios are found in Middle East/Africa (45% new vs. 30% used) and North America (34% new vs. 22% used) while in Europe, more respondents plan to buy a used car (28%) rather than a new car (22%) in the next two years.

“Marketers need to abandon some preconceived notions about the factors that influence a new versus used car buyer or first-time buyer versus an existing owner,” said Gardiner. “Getting to the heart of what drives purchase decisions allows auto marketers to fine-tune their marketing strategies to address the unique needs of the buyers in their markets.”

Whether new or used, total car-buying intentions are greatest in developing countries, with highest demand in India (83%), Brazil (82%), Indonesia (81%), Thailand (79%), Mexico (79%) and China (78%).

Online Advertising and Content Resonate with Car Buyers

Advertising via online platforms is most helpful to consumers when buying a new car, according to Nielsen’s Media Consumption Survey (2012-2013) across 11 countries.

Nearly half (46%) of respondents say that automotive advertising via websites is “very helpful” when considering the purchase of a new car, compared with 42 percent who say the same about advertising on TV, followed by 32 percent for magazines, 29 percent for newspapers, 21 percent for mobile and 20 percent for radio ads. Online methods resonate most strongly in India, where nearly three-quarters (74%) find websites very helpful, followed by Brazil (69%), China (60%), Thailand (58%) and Russia (51%).

According to Nielsen’s study, the websites considered most informative when making a car purchase are automotive brand websites (65%), professional product review websites (41%), other third-party informational sites (38%) and dealer websites (38%). One-third (34%) of global respondents find social media sites most helpful, and about one-fourth (23%) say video sites with product demonstrations are most useful.

“Online is developing globally as a space to reach buyers that are actually engaged in marketing content,” said Gardiner. “Car buyers also have a propensity toward Original Equipment Manufacturer (OEM)-branded sites, suggesting that marketers should be paying significant attention to the effectiveness of these owned assets.”

Love of Driving Triggers Auto Sales

According to Nielsen’s survey, 84 percent of global respondents in the market to buy a new car say that aside from financial reasons, an emotional love of driving is the biggest trigger of automotive

sales. Owning a car to fulfill utilitarian needs (63%) or to reflect a symbol of status (62%) are other motivators that will spur future automotive demand.

“Automotive makers are well aware of the power of emotional connections for car buyers, but the key is making sure these messages are clear and resonate through their campaigns to the right audience,” said Gardiner. “If auto marketers know that consumers are driven by status, then sales efforts centered on the luxury car market should be a priority focus. Similarly, with utility-minded, finance-driven or driver-enthusiast consumers, a keen focus on their desires will ensure that marketing strategies are proactive and aligned with their wants.”

Nielsen information shows that while the love of driving as a purchase motivator among existing car owners is greatest in Asia-Pacific (86%), 75 percent of respondents are also driven by the desire for status, followed by the need for utility (69%). Among existing car owners in the Middle East/Africa and Latin American regions, a love of driving (85% Middle East/Africa; 83% Latin America) and status (69% Middle East/Africa; 49% Latin America) are motivators, followed by utility (56% Middle East/Africa; 44% Latin America). In North America and Europe, respondents cite the love of driving (80% North America; 82% Europe) over utilitarian reasons (71% North America; 56% Europe) and status intentions (51% North America; 42% Europe).

About the Nielsen Global Survey

The Nielsen Global Survey of Automotive Demand was conducted between August 14 and September 6, 2013, and polled more than 30,000 online consumers in 60 countries throughout Asia-Pacific, Europe, Latin America, the Middle East, Africa and North America. The sample has quotas based on age and sex for each country based on their Internet users and is weighted to be representative of Internet consumers. It has a maximum margin of error of $\pm 0.6\%$. This Nielsen survey is based on the behavior of respondents with online access only. Internet penetration rates vary by country. Nielsen uses a minimum reporting standard of 60 percent Internet penetration or an online population of 10 million for survey inclusion. The Nielsen Global Survey, which includes the Global Consumer Confidence Index, was established in 2005.

About the Nielsen Media Consumption Study

The Nielsen Media Consumption Study was conducted in 2012-2013 and polled more than 85,000 consumers in 11 countries using a combined online and offline methodology. The countries in the study include: Australia, Brazil, China, France, Germany, India, Italy, Russia, Spain, Thailand and the United Kingdom.

About Nielsen

Nielsen Holdings N.V. (NYSE: NLSN) is a global information and measurement company with leading market positions in marketing and consumer information, television and other media measurement, online intelligence and mobile measurement. Nielsen has a presence in approximately 100 countries,

with headquarters in New York, USA, and Diemen, the Netherlands. For more information, visit www.nielsen.com.

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ⁱ While an online survey methodology allows for tremendous scale and global reach, it provides a perspective on the habits of existing Internet users, not total populations. In developing markets where online penetration is still growing, audiences may be younger and more affluent than the general population. In addition, survey responses are based on claimed behavior, rather than actual metered data.