

# Expectations of automotive customers when buying and using vehicles

The results of the EY survey among Turkish, Hungarian, Romanian, Russian and Czech drivers

February 2021



Building a better working world

# Basic information about the survey

The survey of Turkish drivers was conducted by EY in order to find current trends in the purchase of new and used vehicles and to find out the opinion of customers on significant innovations in the automotive industry. The same survey was conducted in parallel among drivers in Hungary, Romania, Russia and Czech Republic.

The results mainly demonstrate the different needs of individual groups interested in buying a car.

## Presentation structure

- ▶ Details of the methodology of the survey
- ▶ Significant findings from the survey
- ▶ Survey results
- ▶ Contacts

In addition to the traditional questions about choosing a car and dealer, buying a car over the Internet and looking at electromobility, which we ask respondents every year to monitor the development of their preferences and needs, this year we focused in more detail on used cars, brand importance, after-sales service and mobility services.

We also asked respondents how they were affected by the current situation caused by the Covid-19 pandemic.

This is the fifth year of this unique survey.\*

## Basic information

### Respondents' profile

A total of 3,735 respondents participated in the survey, of which 613 inhabitants of the Turkey, 513 inhabitants of Hungary, 507 inhabitants of Romania, 1,589 inhabitants of Russia and 513 inhabitants of Czech Republic divided into groups according to:

- ▶ Gender
- ▶ Age
- ▶ Education
- ▶ Residence
- ▶ Gross household income

### Learn more about the survey

- ▶ The conditions for inclusion in the survey were the ownership of a driving license, regular use of the car and the age between 20 and 60 years.
- ▶ The survey was conducted in September and October 2020.
- ▶ The survey contained 32 questions.

\*Turkey has been added to the survey scope as of 2020.

An aerial photograph of a multi-level highway interchange during sunset. The sky is filled with vibrant orange and yellow light, which casts a warm glow over the scene. The highway is illuminated by the low sun, and several cars are visible on the roads, their headlights and taillights glowing. A large, semi-transparent white number '1' is overlaid on the left side of the image. Below the number, the text 'Survey methodology' is written in a clean, white, sans-serif font. A thin yellow horizontal line is positioned directly under the text.

# 1

## Survey methodology

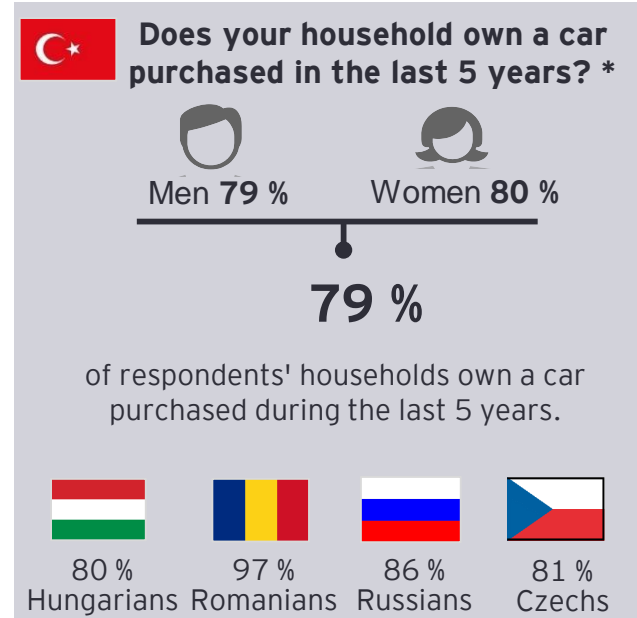
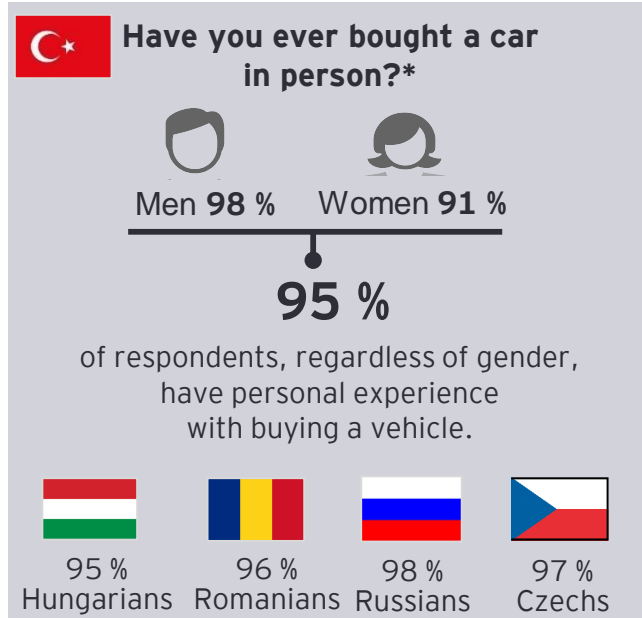
# Details of the methodology of the survey

- ▶ In September and October 2020, survey addressed 613 respondents from Turkey, 513 respondents from Hungary and 507 respondents from Romania via an online questionnaire. Data collection in Russia (1,589 respondents) and Czech Republic (513 respondents) took place through local agencies. A common characteristic of all respondents across countries is the ownership of a driver's license, active use of the car and at the same time belongs to the age category of 20 - 60 years.
- ▶ The sample of respondents was adjusted according to the following quotas - min. 80% have ever bought a car, min. 80% bought a car in the last 5 years, min. 35% plan to buy a new car in the next 5 years (the resulting quota was 49%).
- ▶ Respondents who have never bought a car and plan to buy it in more than 5 years or do not plan it at all were excluded from the survey.
- ▶ The main questionnaire was composed of 14 questions for classification into socio-economic categories and 32 survey questions.
- ▶ Depending on the type of question, the basis of possible answers was chosen either by a specific list of services and functionalities (choice of one answer or choice of several answers) or by evaluating the given criterion on a scale from 1 to 5.
- ▶ Due to the rounding or omission of some type of answer in order to ensure a more relevant comparison, in some cases the total sum of the displayed graphs is not equal to 100%.
- ▶ For the purposes of this questionnaire, the term seller refers to the enterprise as such (premises, equipment, personnel, exhibited vehicles, etc.).
- ▶ In the case of marking the group as Turks, Hungarians, Romanians, Russians and Czechs, it is not a representation of the nation, but a representative description of drivers from the country according to the specified survey criteria. Where the results are not compared between national respondents, they relate only to respondents in Turkey.

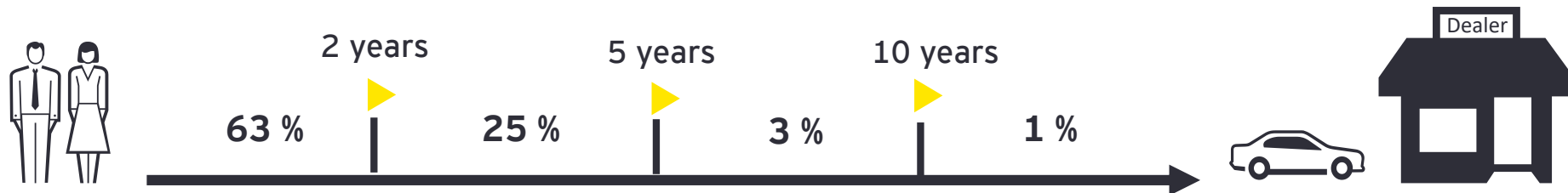
## Distribution of respondents from Turkey across the monitored categories

	#	%
<b>Gender:</b>		
Men	357	58 %
Women	256	42 %
<b>Age:</b>		
20-29	156	25 %
30-44	345	56 %
45-60	112	18 %
<b>Education:</b>		
Primary school	8	1 %
High school	135	22 %
University	470	77 %

# Characteristics of respondents



 **In what time frame are you considering buying your next car?\***

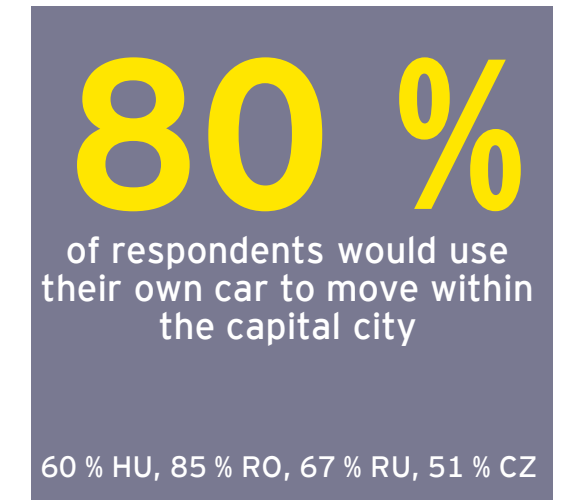
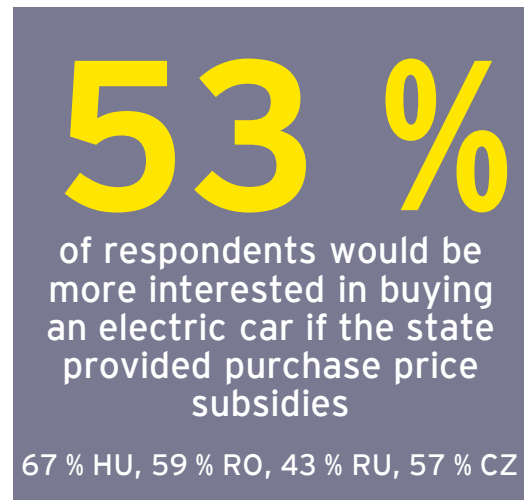
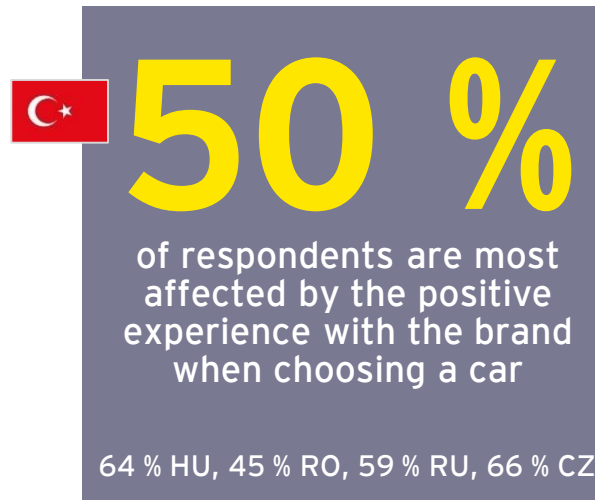
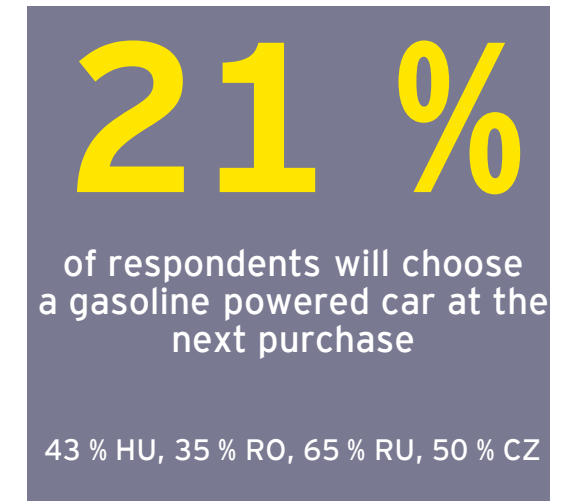
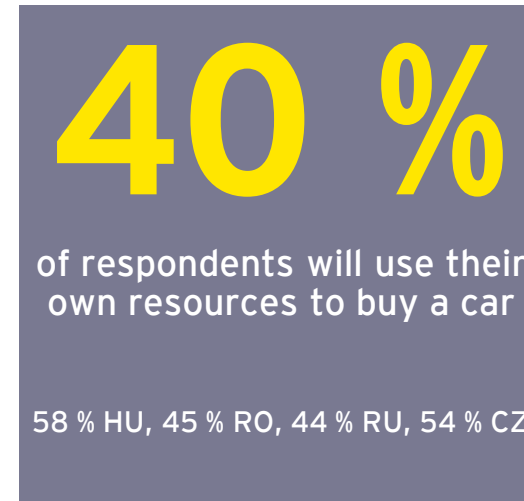
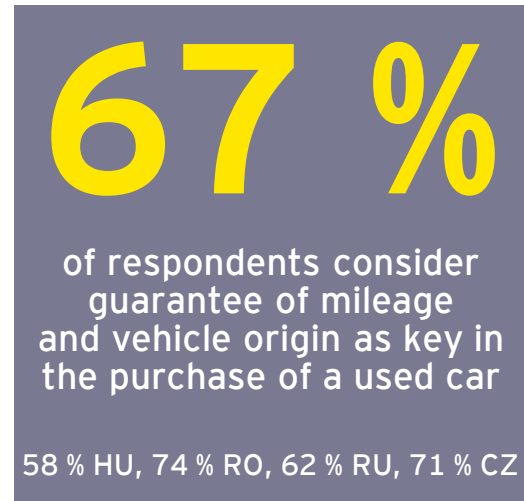
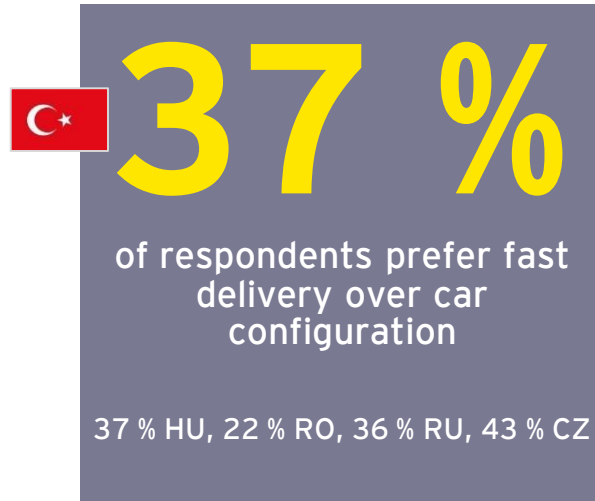


\* Both new and used cars.

An aerial view of a multi-lane highway at sunset. The sun is low on the horizon, casting a warm glow over the scene. Several cars are visible on the road, their headlights and taillights illuminated. The highway curves through the landscape, and the overall atmosphere is serene and dynamic.

# Significant findings

# Significant findings from the survey





# 3 Selection of a car and a dealer



# What effect does the COVID - 19 pandemic have on the planned purchase of a car?

## Purchase process

Did the current situation of COVID - 19 change your plans regarding the purchasing process?



54 %

No, I plan to implement the entire purchasing process in the dealership



18 %

Yes, I will use the test drive and take over the car in the dealership, but I will take the remaining steps online



11 %

Yes, I will take over the car in the dealership, but I will take the remaining steps online

8 %

Yes, I will use the test drive, but I will take the remaining steps online



8 %

Yes, from the range of car brands, I choose the one which allows me to complete implementation of the purchasing process online

## Purchase plans

Has the current situation of COVID - 19 changed your plans for the purchase of a new vehicle?



29 %

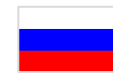
The situation did not affect my planned purchase of a car



Hungarians  
56 %



Romanians  
49 %



Russians  
47 %



Czechs  
69 %

11 %

I will postpone the planned purchase until the purchase of the car is strictly necessary



Hungarians  
20 %



Romanians  
15 %



Russians  
9 %



Czechs  
14 %

18 %

I still intend to buy a new car, but lower class, possibly cheaper car of another brand



Hungarians  
4 %



Romanians  
10 %



Russians  
10 %



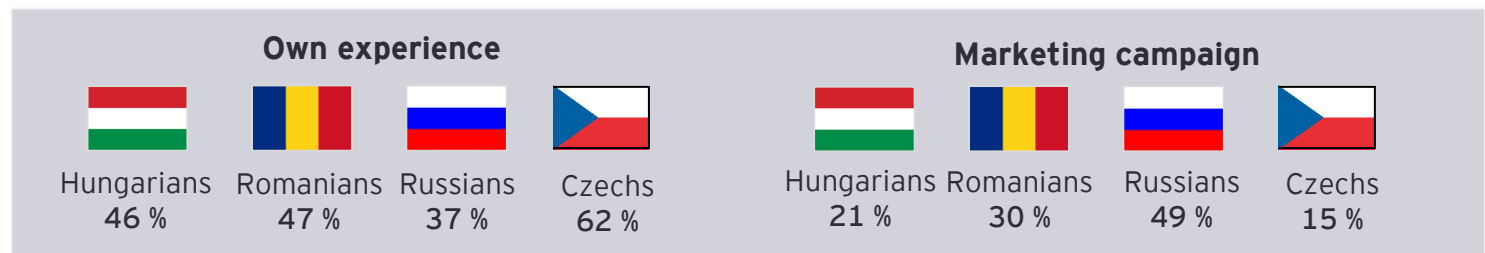
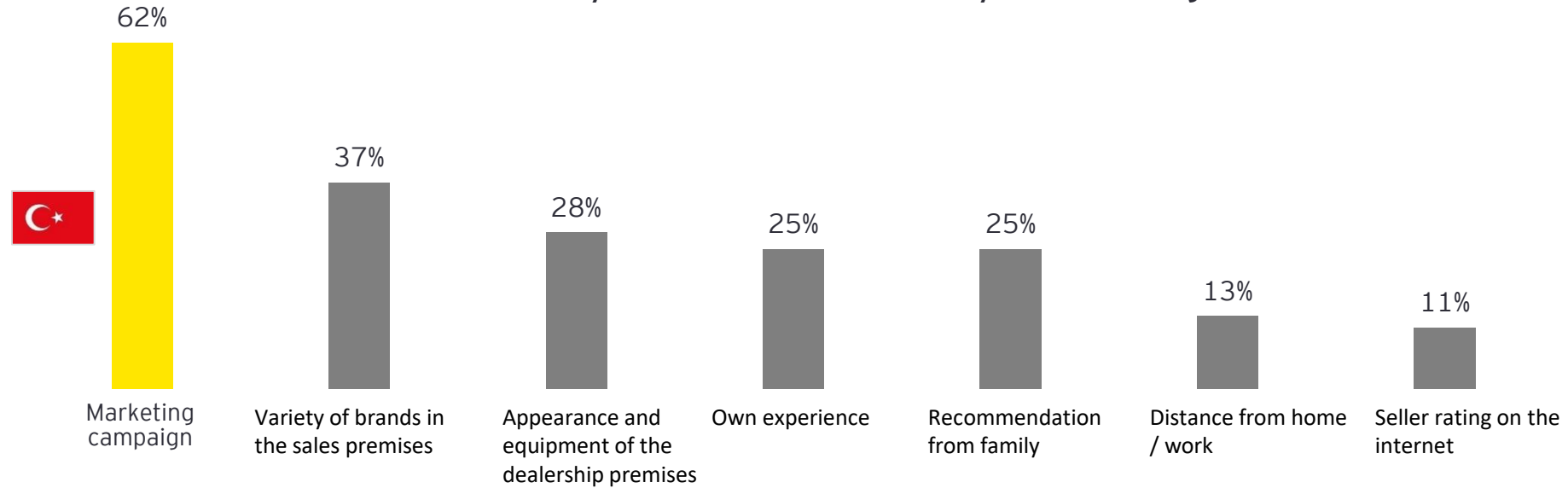
Czechs  
5 %



The COVID-19 pandemic has significantly affected car purchase plans. Mostly, Turks feel affected by this situation; where other nationality respondents do not feel that much affected.

# How do I choose a dealer?

## How do you choose the car dealer you are visiting?



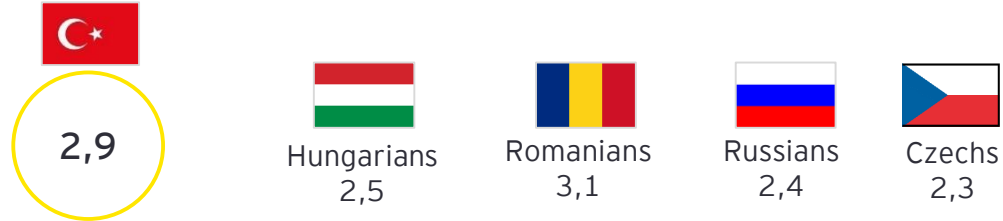
### Recommendations from acquaintances according to the preference of the next car



Marketing campaigns are the important factor for Turkish people when choosing car dealers to visit; whereas respondents from other countries value their own experience significantly more.

# How many times do I visit a dealer before buying a car?

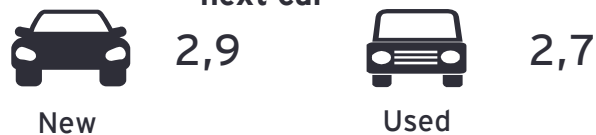
How many times would you visit a dealer before you buy a car?



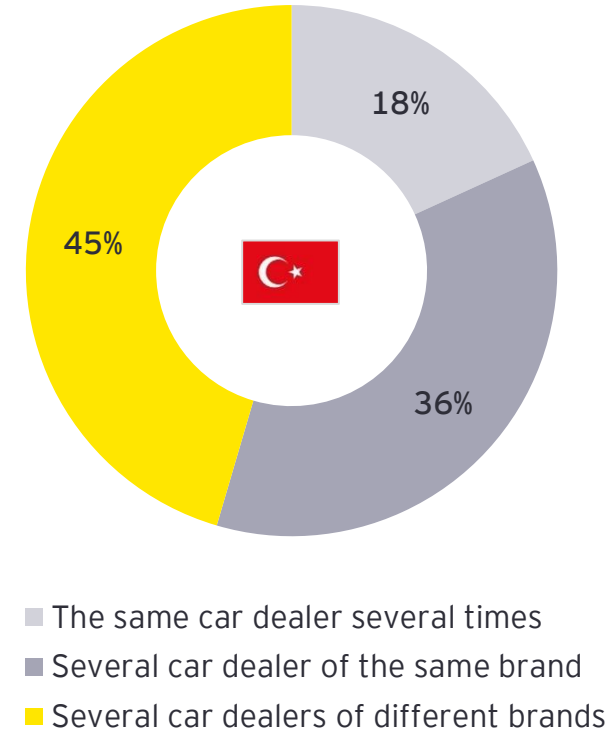
2020



**Number of visits according to the preference of the next car**

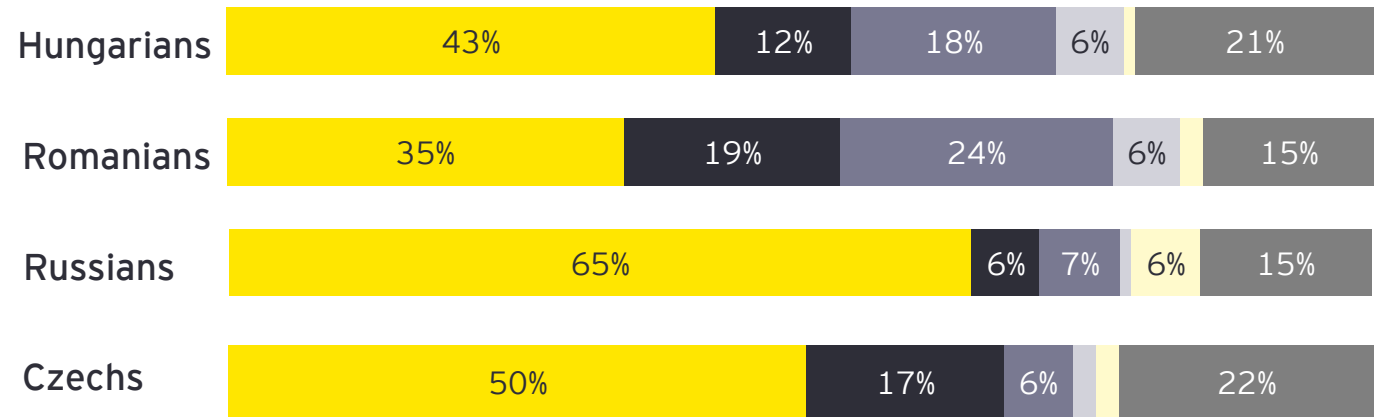
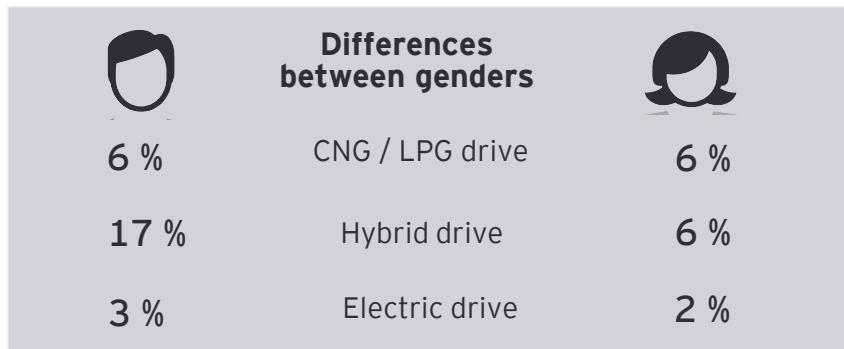


If you visit the dealer more than once before buying, who would you most likely visit? \*



The average number of visits to dealers by Turkish drivers is higher compared to other countries. However, drivers prefer to visit multiple dealers of different brand, from which relatively low loyalty to the brand can be inferred.

# What engine will your next car have?



■ Petrol 
 ■ Diesel 
 ■ Hybrid 
 ■ Electric 
 ■ GAS (CNG/LPG) 
 ■ Don't know

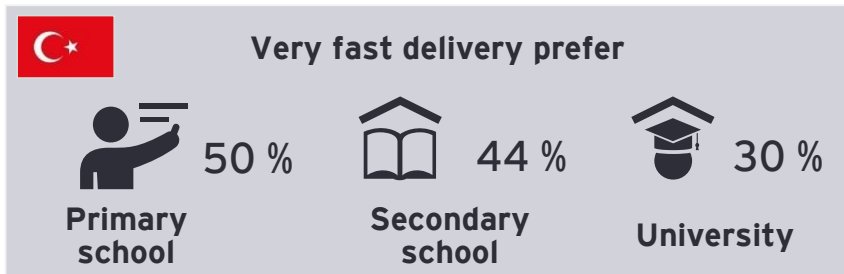
## Turkey Diesel drive want to buy



Interest in a diesel engine is still at the forefront among Turkish drivers indicating fuel consumption is a major decision criteria compared to other countries. The increased popularity of alternative fuels in Hungary and Romania is due to state support through subsidies.

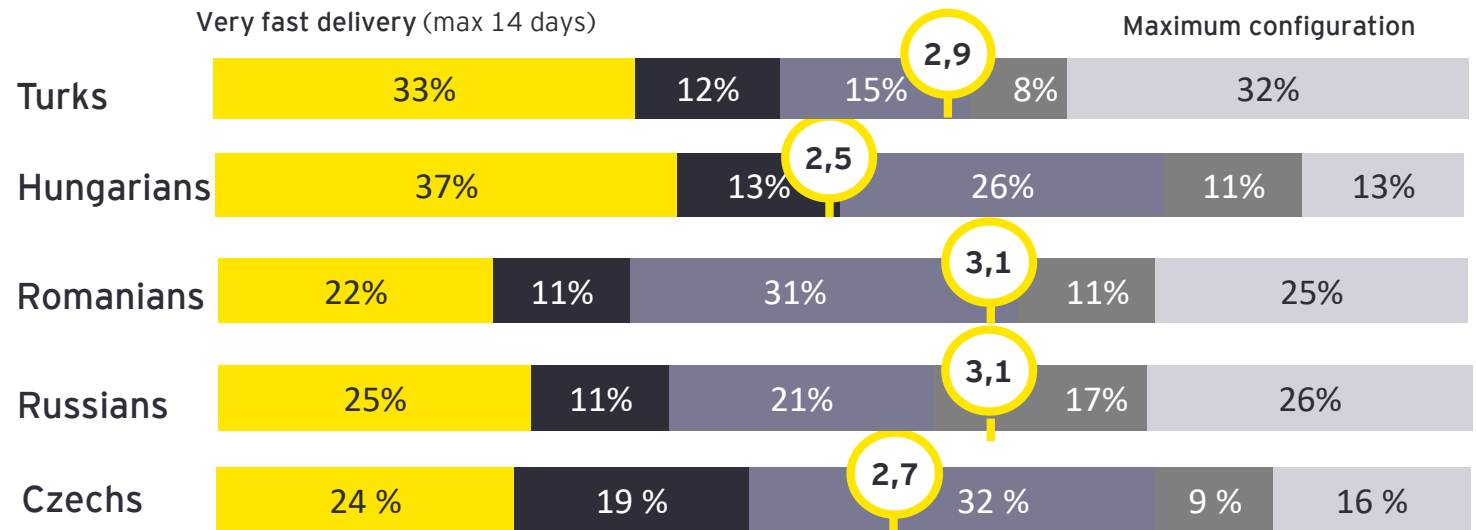
# Am I going to wait for my new car?

Is it more important for you to get the car immediately, but to choose only from limited options, or to configure the car as much as possible, but wait for it for a longer time (1/2 year)?



**33 %** of drivers using a car almost every day primarily around the city prefer very fast delivery

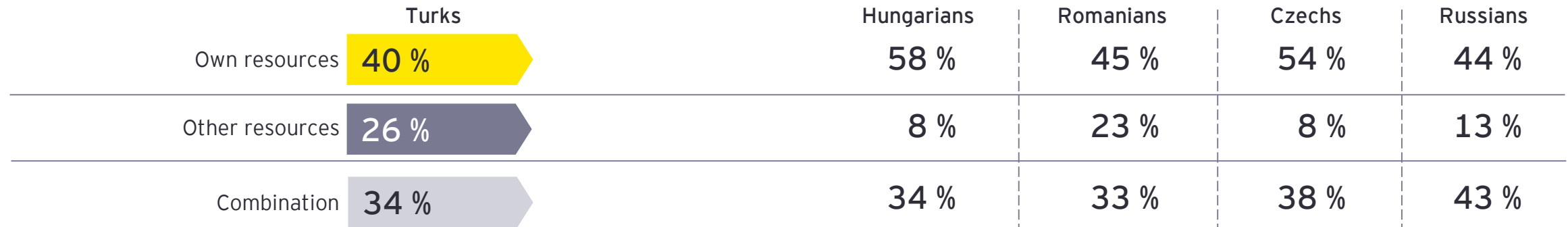
Preferences for configuration options are growing with the level of education, as well as with the planned value of the acquired cars.



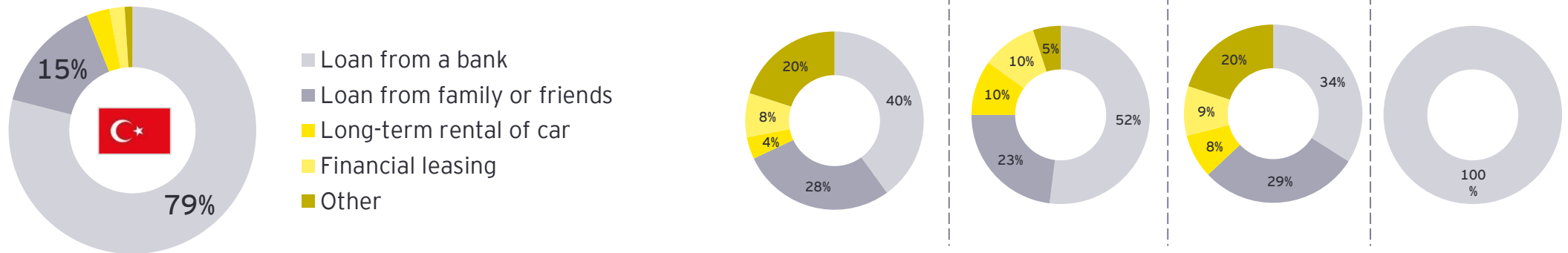
Turkish drivers value car configuration more than other countries, fast delivery is important for all


# Where do I get enough funding?

What is the most likely method of financing when you buy your next car?



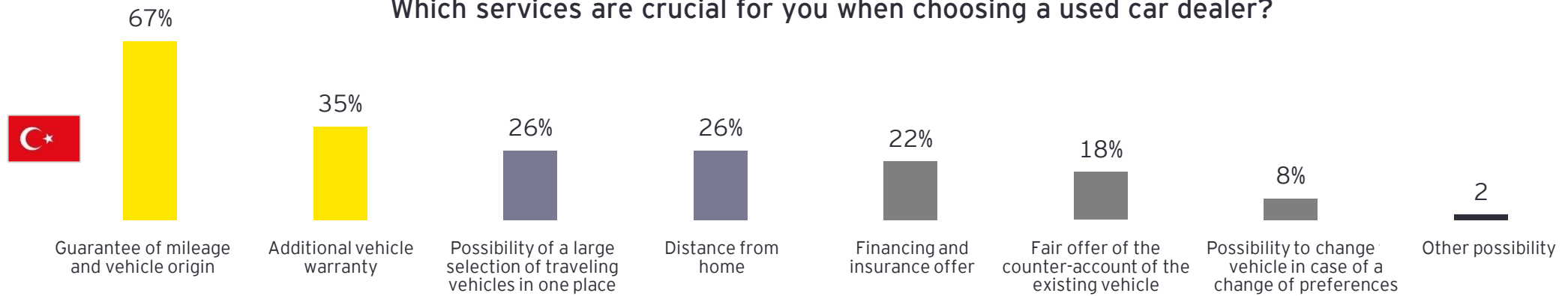
If you were looking for financing from other sources, what method of financing would you choose?



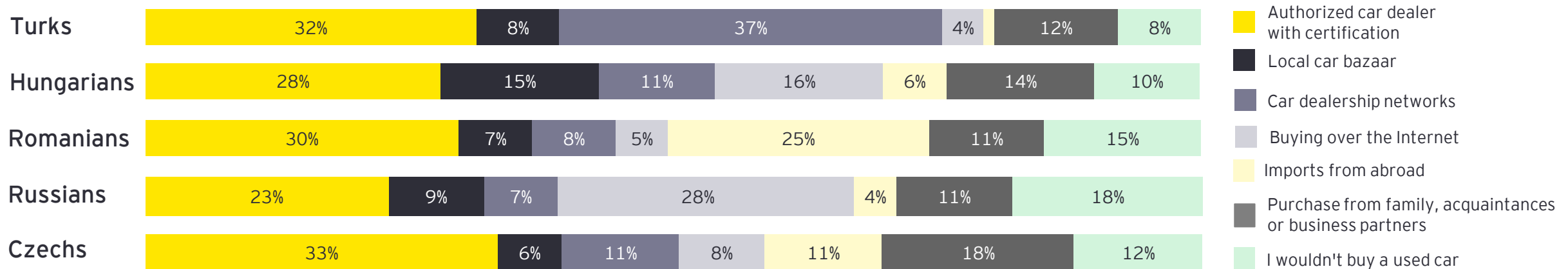
 Turkish drivers prefer to use alternative funding sources rather than own resources more than others. Bank loan is nearly the main address of Turkish drivers (and also Russians) who seek alternative funding where drivers from other countries prefer options of leasing, long term rental and loan from family members significantly more

# How do I decide when buying a used car?

## Which services are crucial for you when choosing a used car dealer?



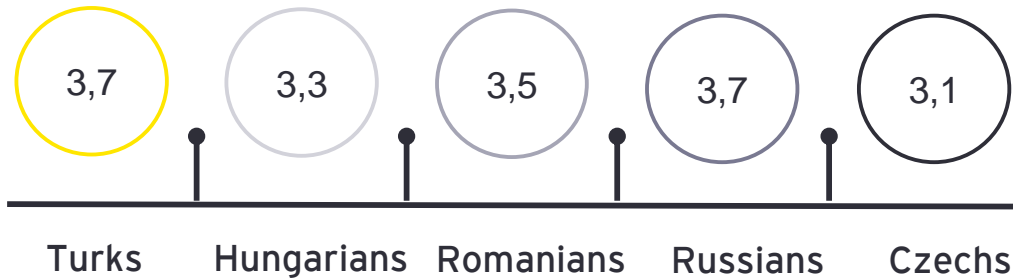
## What option would you most likely choose when buying a used car?



The guarantee of mileage and additional vehicle warranty is a key criteria for for all. Turks and Romanians are significantly distant to online buying compared to others for today's purchases (future possibilities are asked separately in the next section).

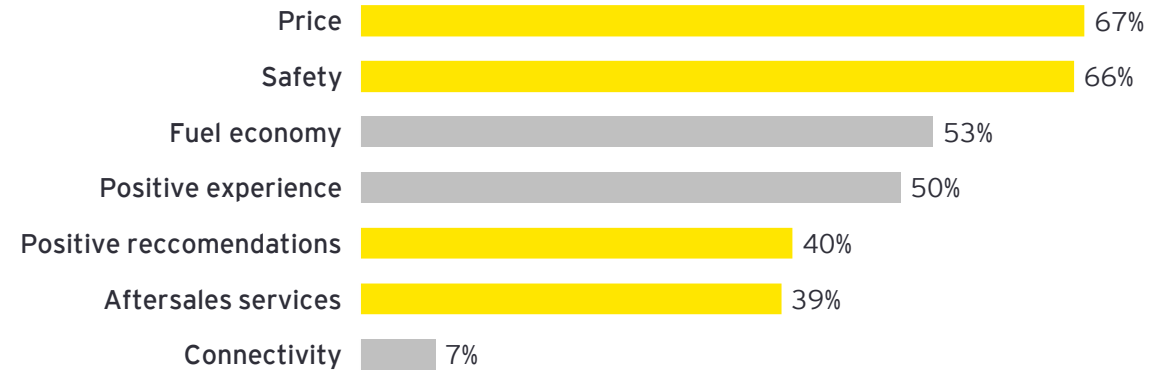
# How important is the brand of the car and what factors affect your choice of the brand?

How important is the brand of the car you own/plan to buy to you?

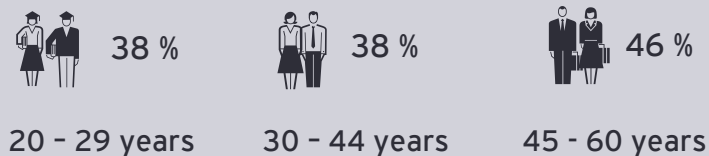


1 - not at all, I perceive the car only as a means of transport  
5 - significantly, the car is a reflection of my personality for me

 Which factors influence you the most when choosing a car brand?



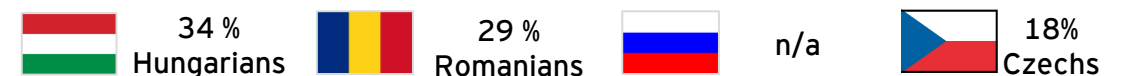
The brand of the car is of the most importance to me, the car is a reflection of my personality



Good after-sales service appreciate



Appreciation for recommendations form other people

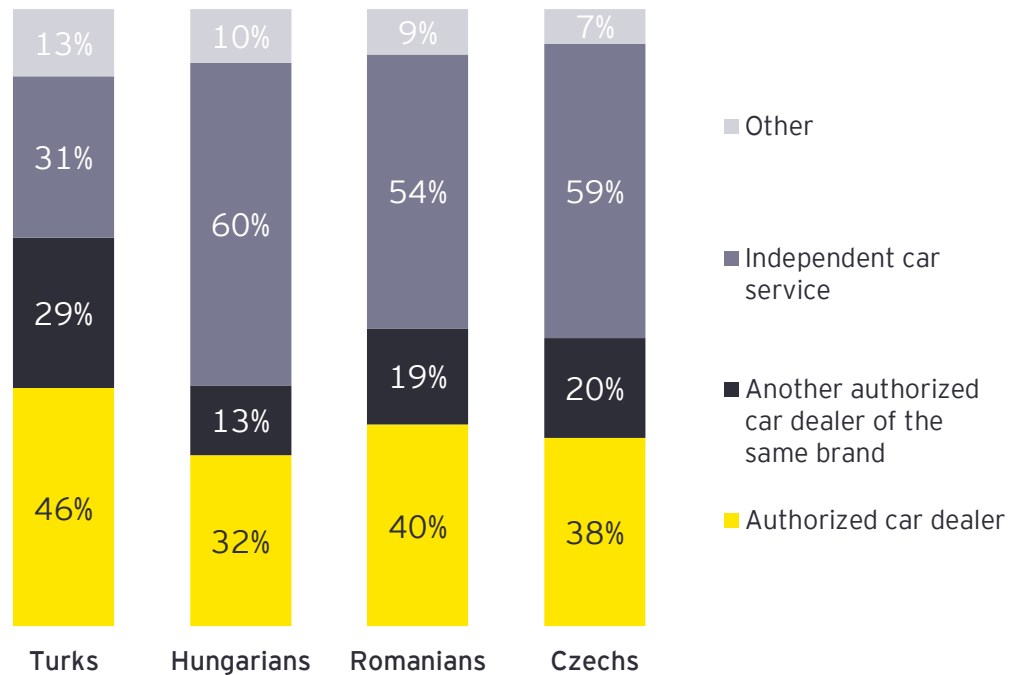


Turks and Russians perceive the brands of their cars as a reflection of their personality more than others. When choosing a car brand, Turkish drivers value the recommendations from others and the quality of after-sales service more than others; price, fuel economy and safety are the top criteria for all.

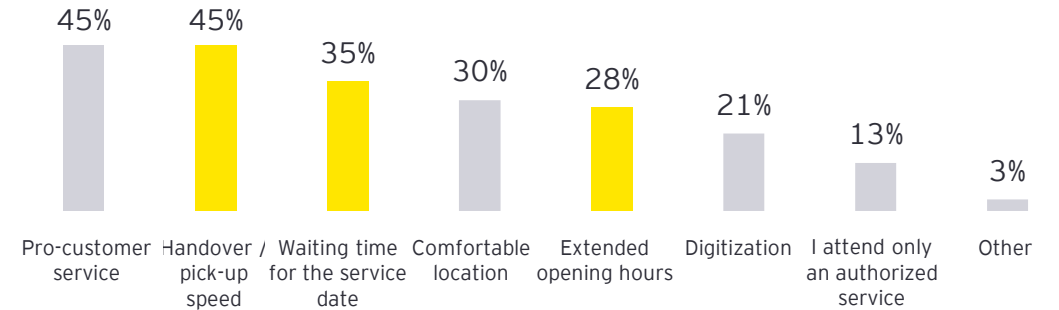


# How is your vehicle serviced?

Which of these entities have you visited in the last 2 years for the purpose of servicing your car?



 Which of the following options would motivate you to visit an authorized service center on the next service visit?



## Appreciation for handover / pick-up speed



## Appreciation for waiting time for service




## Appreciation for extended opening hours



Originally authorized and other authorized service centers are the top choice of Turkish drivers with a significantly higher share than others. Technical capability of the service is the top priority for all. Handover speed, waiting time for service and extended opening hours of the service shop are the top criteria for Turkish drivers.

# How will your vehicle be serviced in the future?

 If you could choose an ideal way/place to service your vehicle, what/where would it be?

- 45 %** Service while you wait for quick repairs within 2 hours (e.g. oil change)
- 37 %** Traditional service
- 36 %** Quick check-in/ pick-up of the car in a special place 24/7 without the participation of service personnel
- 26 %** Mobile service or courier, who arrives at the agreed place (for an appropriate fee)
- 15 %** Priority ordering for service within a few days in case of more demanding repair / maintenance (at the appropriate additional cost)

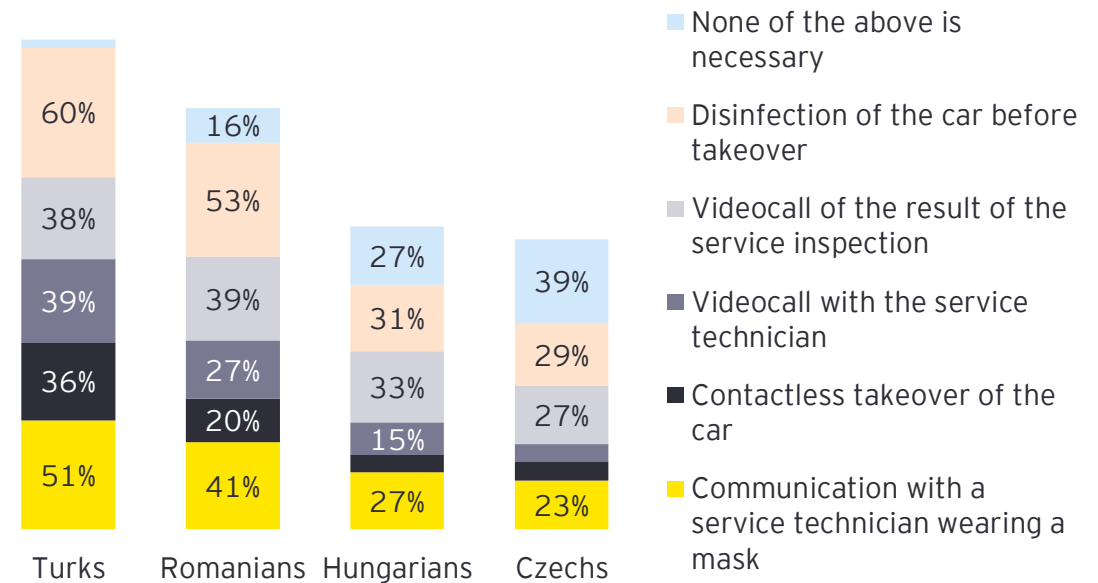
**41 %** of drivers in ages 20 - 29 living in Turkey would use the service quick check-in / pick-up of the car at a place available 24/7 (28% for 45-60 years old drivers)


**52 %** of drivers in ages 40 - 65 living in Turkey would appreciate traditional service set-up (28% for 20-29 years old drivers)



Young Turkish drivers appreciate innovative customer oriented services (quick repair within 2 hours, 7/24 mobile service, etc.) significantly more than elders. Turks appreciate any kind of additional COVID related service approach on top of regular traditional service activities more than others.

Which of the following services would you appreciate the next time you visit a service center?\*



 Disinfecting the car before takeover would be appreciated

Men **56 %**      Women **66 %**

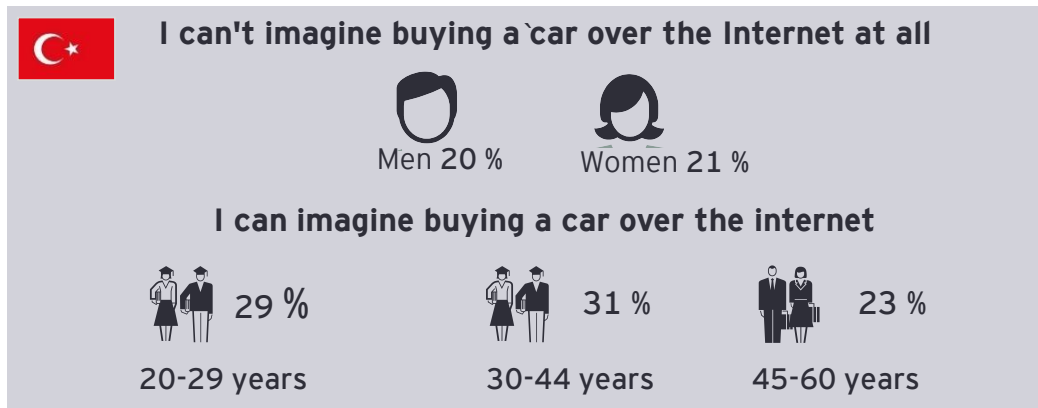
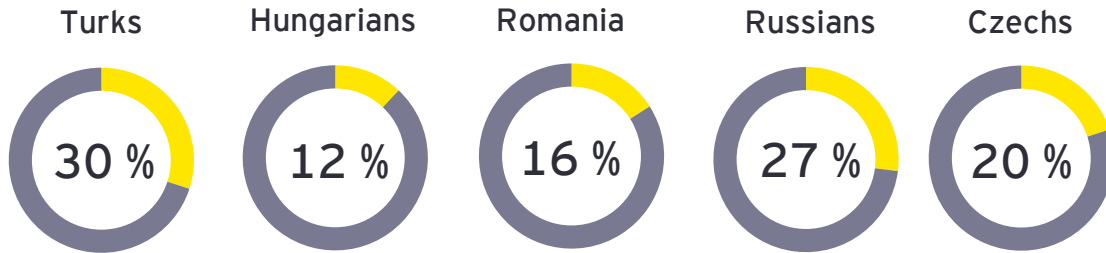
An aerial view of a multi-lane highway at sunset. The sun is low on the horizon, casting a warm glow over the scene. Several cars are visible on the road, their headlights and taillights illuminated. The highway curves through the landscape, and the overall atmosphere is one of a busy, modern transportation network.


# 4

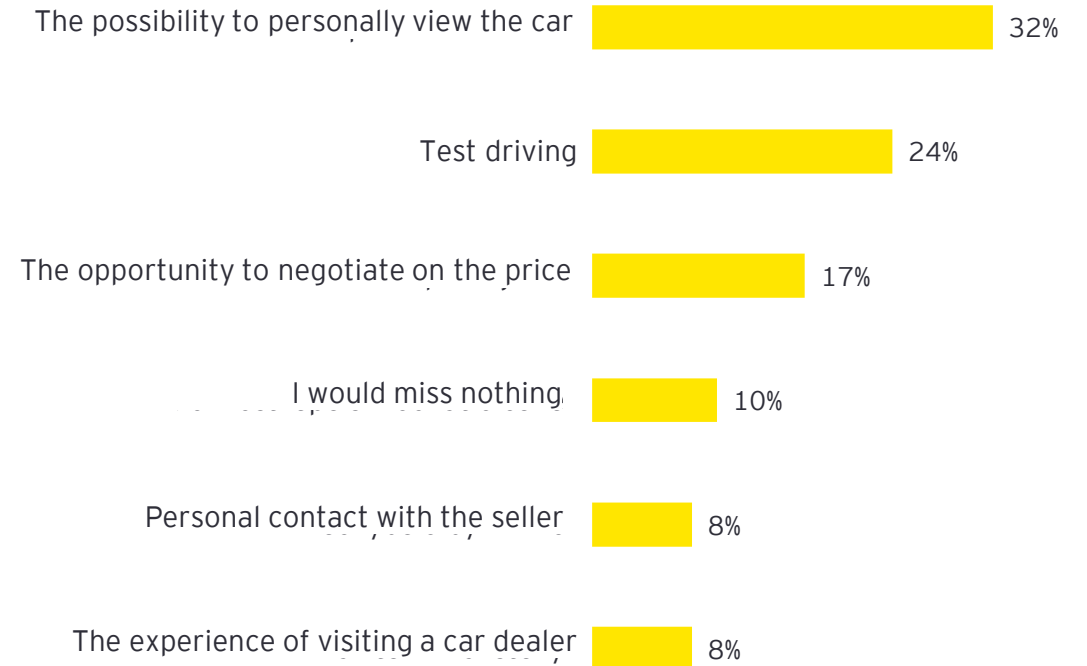
## Trends and technologies

# Am I willing to buy my car over the Internet?

Can you imagine buying a car over the internet?



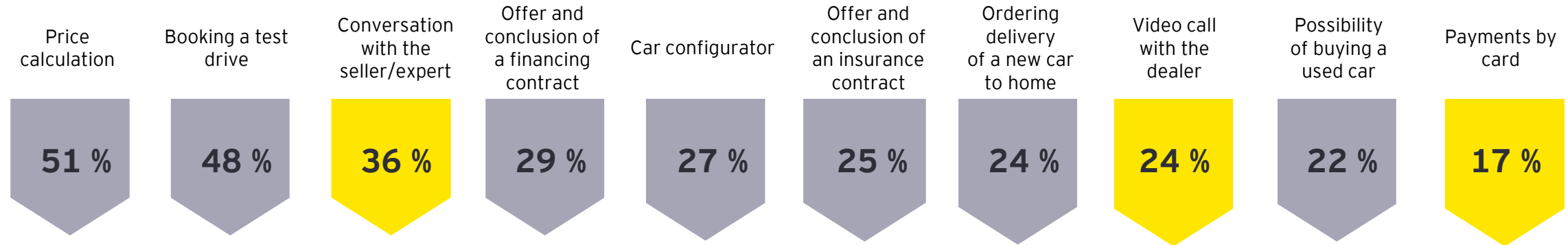
 What would you miss the most when shopping over the internet (2020)?



Turks are not much distant to buying a car over internet in future compared to others. In case of an online car purchase, drivers think that hands-on experience and test drive would be missed the most, followed by missing the opportunity to negotiate on the price. This indicates experience stores can complement online car buying experience for new cars; for used cars online buying is still a distant option.

# What services do I expect when buying over the Internet?

 If you had the option of using these online tools, which would you use during a new car purchase?\*



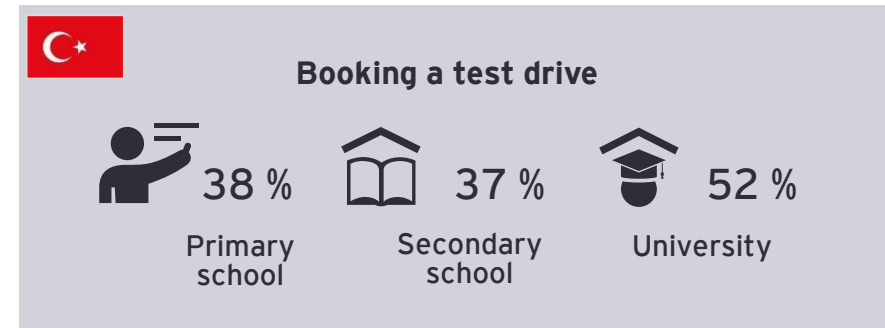
## Conversation with the seller/expert



## A video call with the seller would be used by



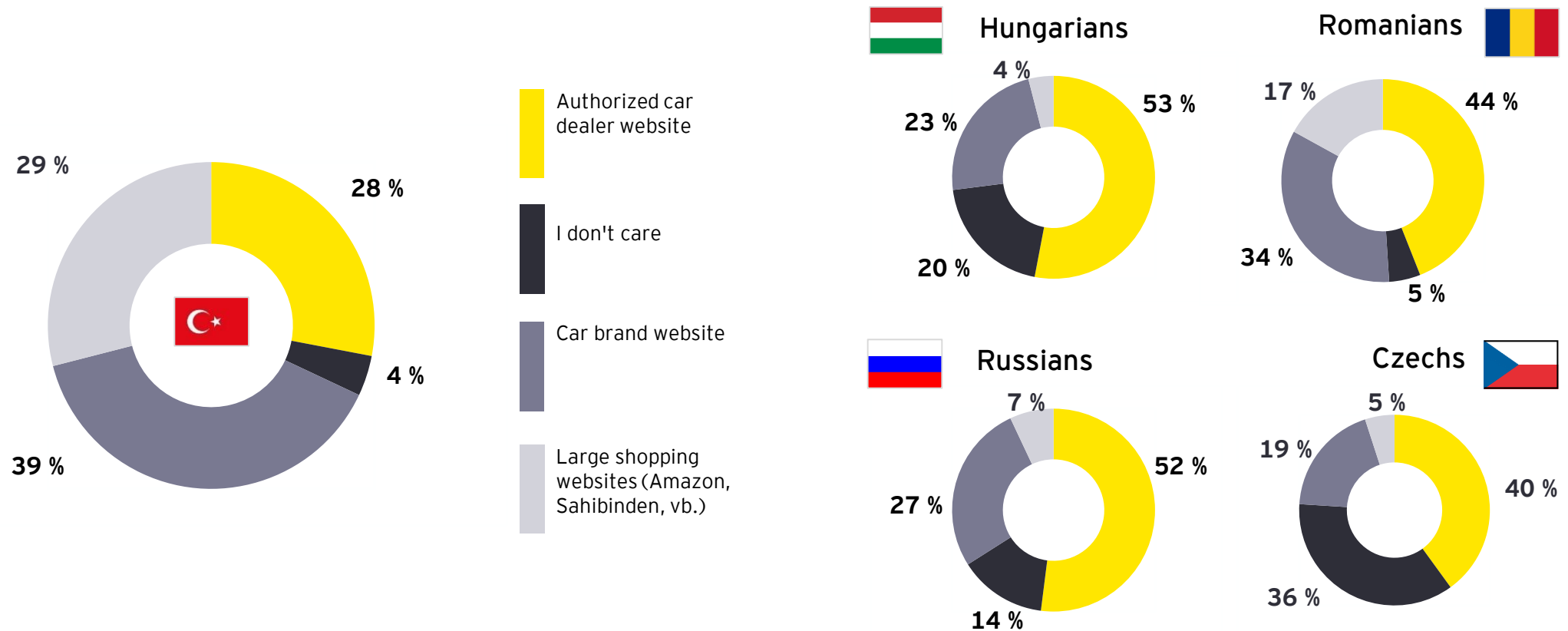
## Payments by card



Price calculation, car configuration and booking a test drive online are the most desired services for all respondents. Turks would appreciate online communication with the seller (voice and video calls) significantly more than others while they are more distant to online credit card payment.

# Where can I get a vehicle on the Internet?

If you were shopping online, which website would you most likely use for buying a car?

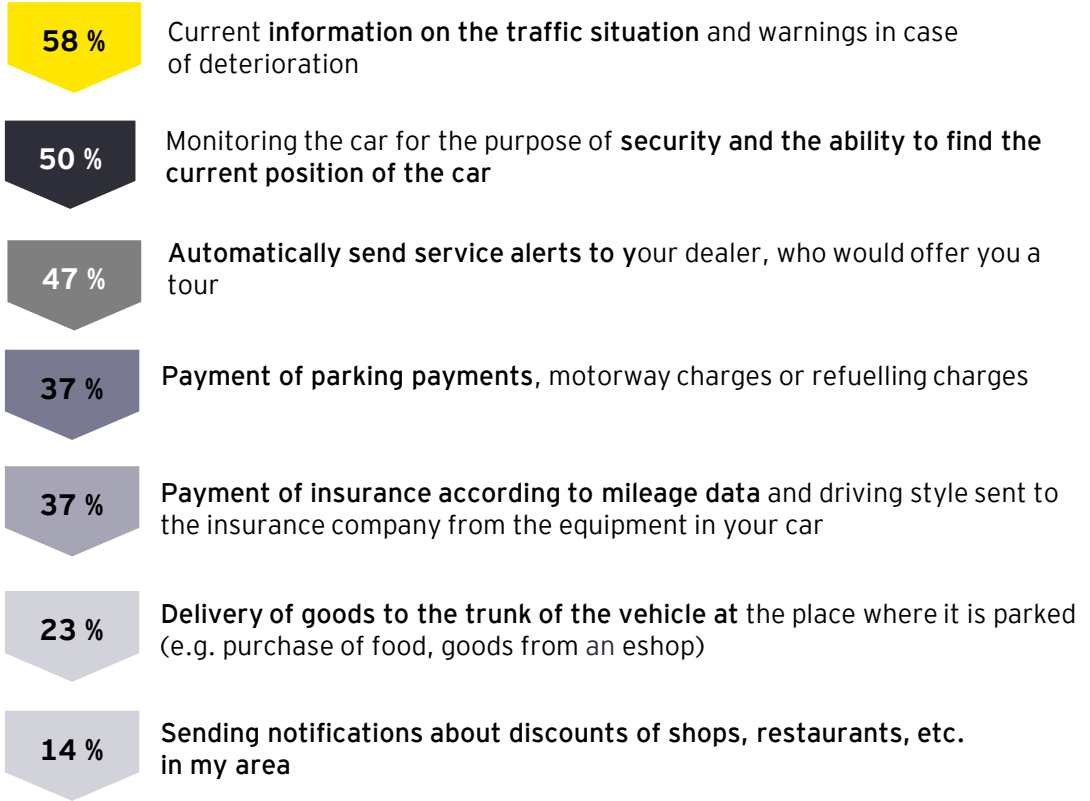


To buy a car online, most respondents in Turkey would choose car brand website, whereas Romanians, Hungarians and Russians would choose authorized car dealer website. Czechs do not care so much about choosing a website, in contrast with other countries.

# What purpose would I use the car's Internet connection for?



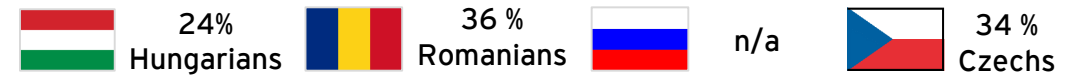
## Which of the features related to connecting the car to the Internet would you use?



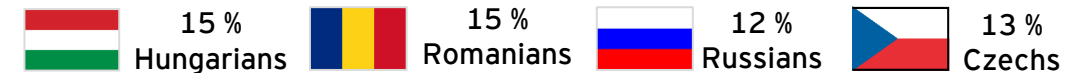
### Receiving information on the traffic situation would be appreciated by



### Automatically send service alerts to the dealer would be appreciated by



### Delivery of goods to the trunk would be appreciated by



### Paying insurance based on mileage data would be used by

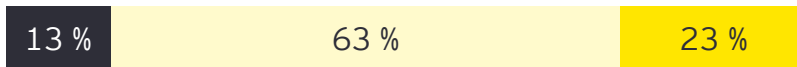


Drivers would make the most of traffic information services. There would be interest in delivering goods to the trunk, especially among mid-age respondents and women.

# Is electromobility relevant to me?


 Would you consider buying an electric car or a hybrid in the future?


## Electric vehicle




## Hybrid



 It's not an attractive option for me and I would not think about it

 In the case of an interesting price offer, I would think about it

 I definitely want to buy in the future

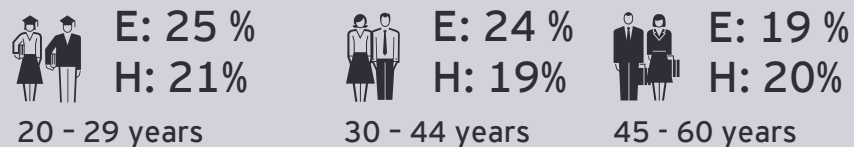
**An electric car would be bought by**  
(definitely or within an interesting price offer):



**A hybrid would be bought by**  
(definitely or within an interesting price offer):



## Electric vehicle (E) / hybrid (H) definitely want to buy



**86 %** of drivers who drive a car **almost every day** primarily around the city are interested in buying an electric vehicle

**77 %** of drivers driving a car **almost every day** primarily outside the city are interested in buying a hybrid

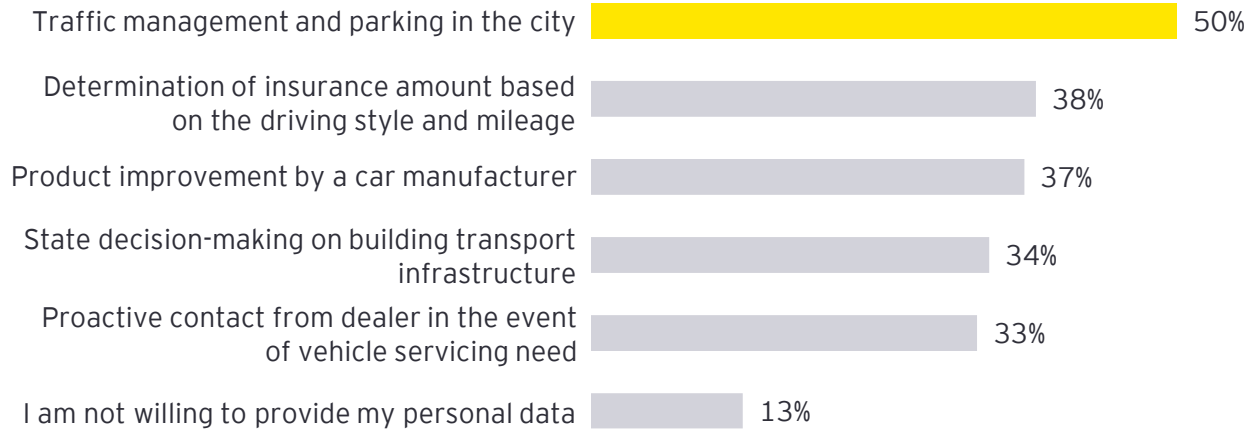


86% of Turks are considering buying an electric car or a hybrid. Interest grows with the level of education in electric cars. Compared to other countries, the interest in electromobility is slightly the highest in Turkey.



# And will I provide access to data about my car and driving style?

## For what purpose would you be willing to provide data about you, your car and your driving style?



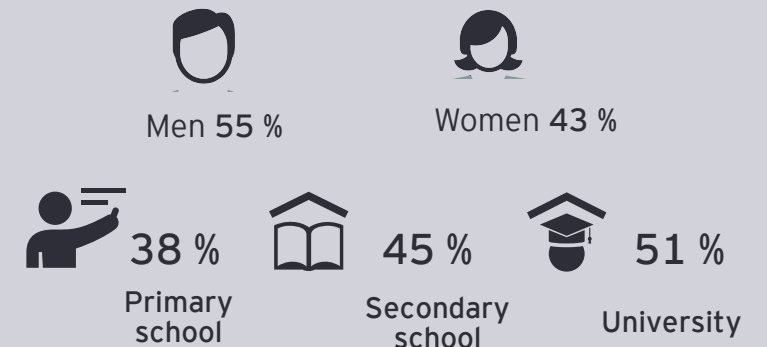
### Proactive contact with the seller in case of need for service would be welcomed



### Not willing to provide data



### Willingness to provide data for traffic management and parking in the city



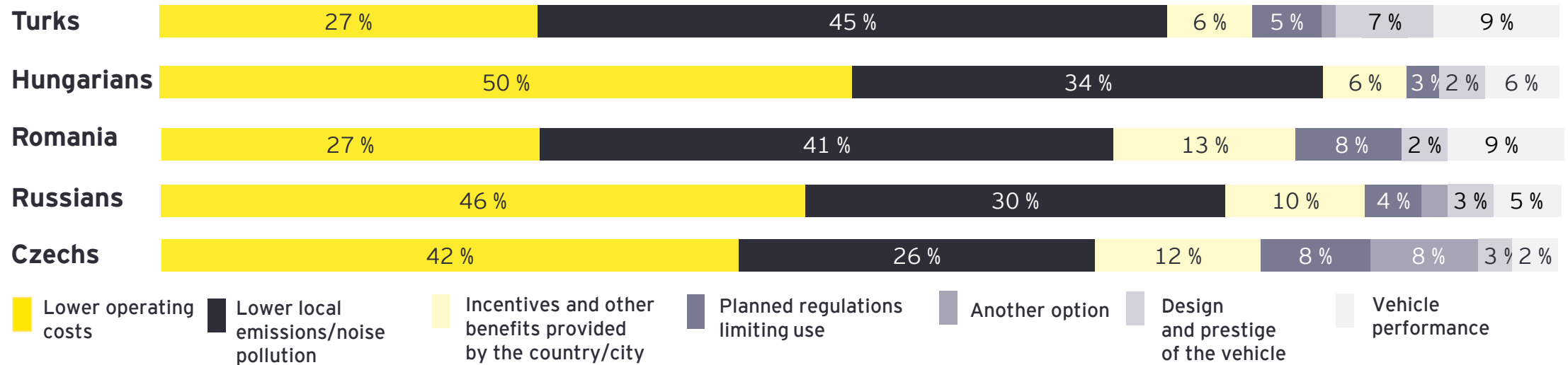
**29%** of drivers using a car at least once a week mainly out of town would provide driving style data to determine the insurance amount based on the driving style and mileage



Turks would be willing to provide data to determine traffic management and parking in the city. Their reluctance to provide data is the second lowest compared to other countries.

# Why is an electric car an attractive option for me?

Why are you mainly interested in buying an electric or hybrid car?\*



\*The question was asked only to respondents who expressed interest in buying an electric or hybrid car

**46 %** of respondents who consider buying an electric vehicle find lower local emissions the most important

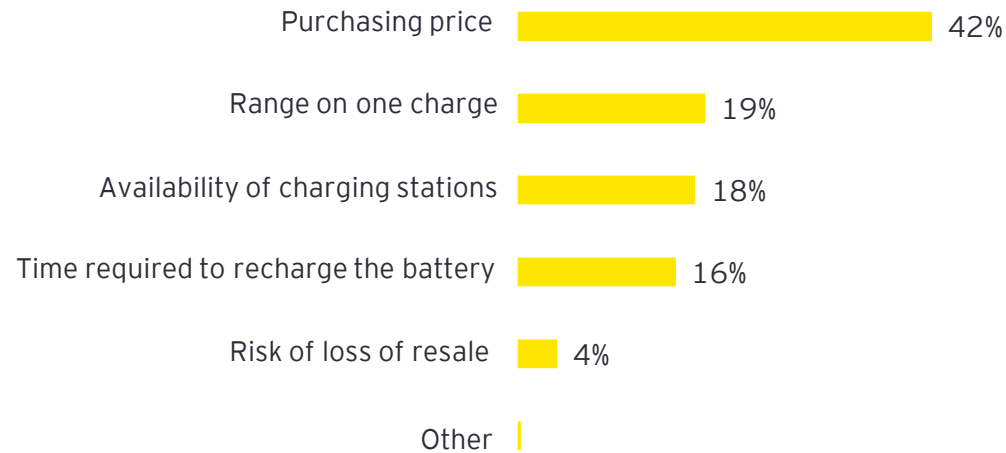
**42 %** of drivers driving a car almost every day primarily outside the city are inclined to electromobility mainly because of the lower operating costs



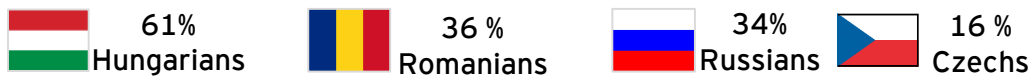
Together with lower operating costs, lower emissions are the main motivations for Turks to buy an EV/HEV. Lack of incentives is standing out for Turkey compared with other countries.

# And what, on the contrary, discourages me from buying an electric car?

## What discourages me from buying an electric car?



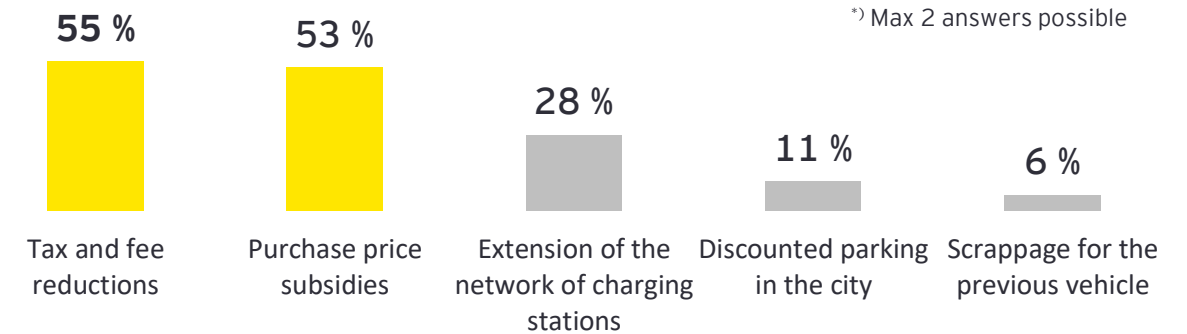
### Purchasing price discourages me



### Availability of charging stations discourages me

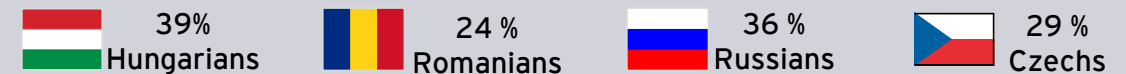


## Through which of the following measures, if any, could the state increase your interest in buying an electric car?\*



**1 %** of drivers would not be interested in an electric car even with such benefits mentioned above

### Tax and fee reliefs would be appreciated by

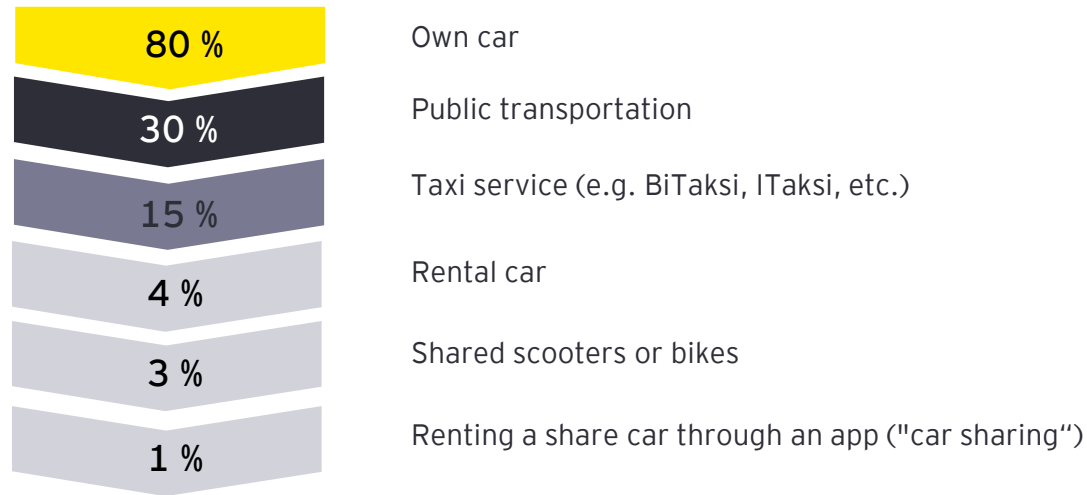


**Turks are most discouraged from buying an electric car because of its price. Turks would welcome state support in the form of tax & fee reliefs and purchase price subsidies.**

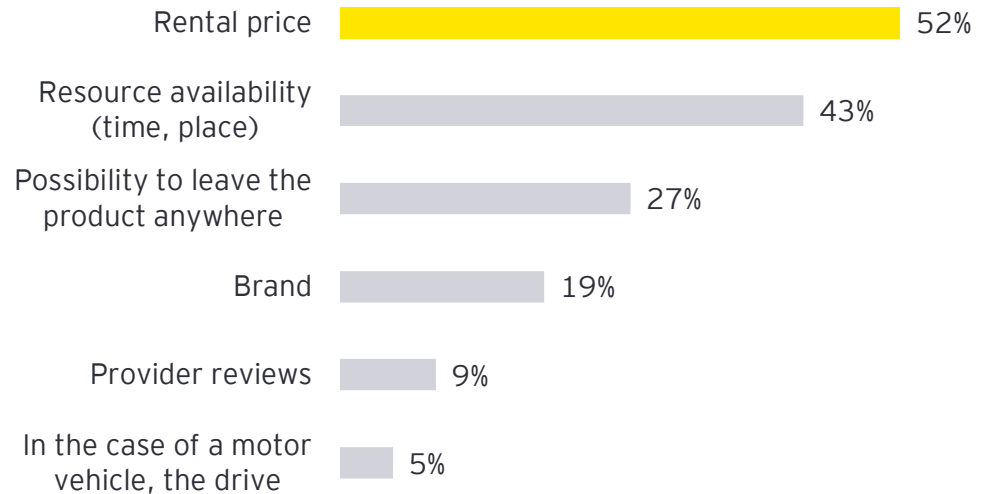
# How do you move within the city?



Which form of transport do you prefer to move within major cities?



What factor is most important to you when renting a shared means of transport (e.g. shared taxi, bikes, scooters, car sharing)?



## Usage of own car in major cities

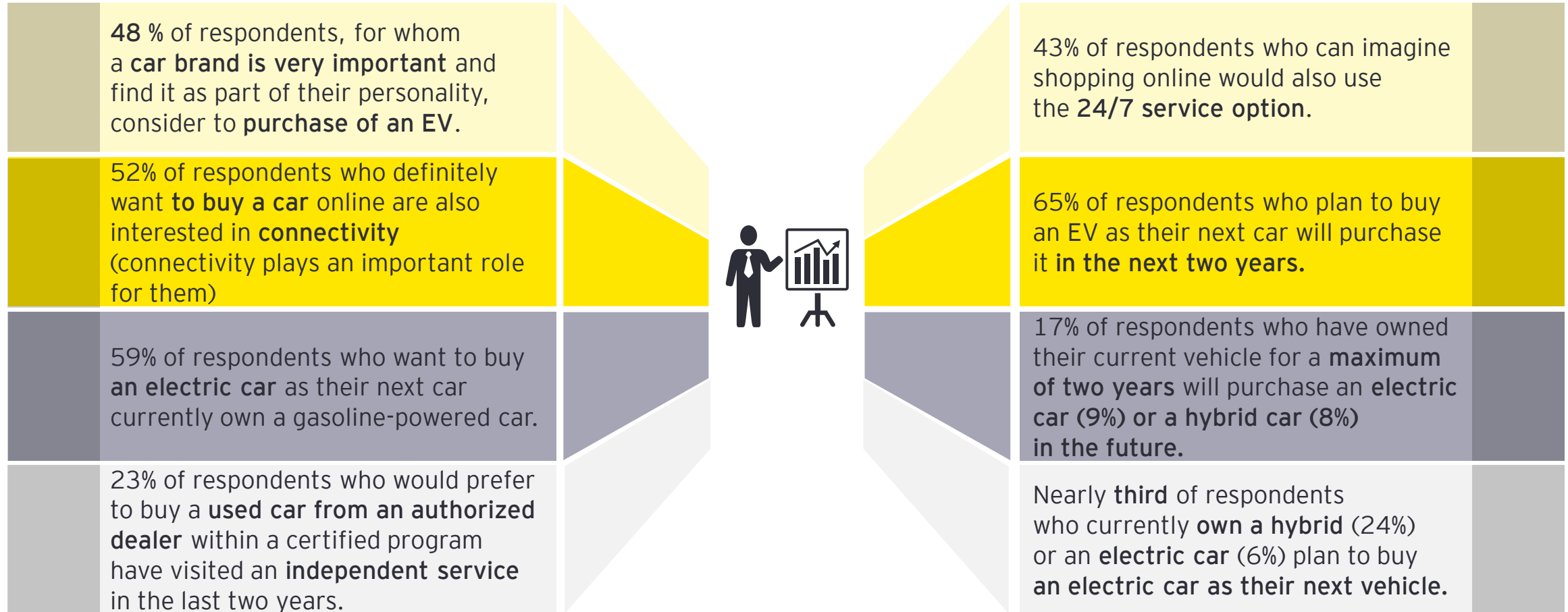


## Usage of public transport in major cities



Turks, Hungarians, Romanians and Russians clearly favour driving their own car to move within a larger city compared to Czechs, who mostly favour public transport. In Hungary, car sharing is the most attractive option for driving in major cities.

# Fun facts (for all respondents)



# Contacts

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