

Automotive Survey: What Digital Drivers Want

Executive Summary

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High performance. Delivered.

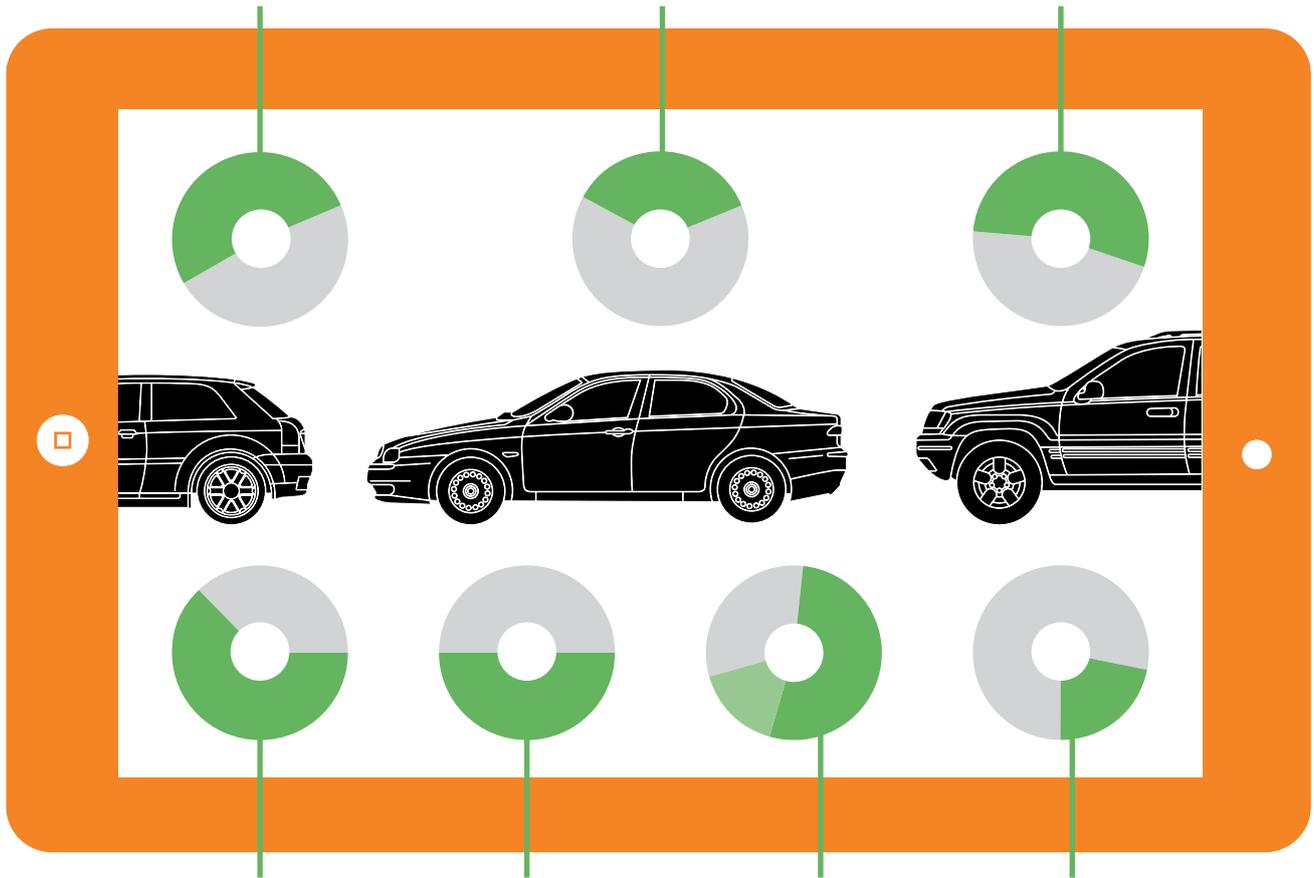
Accenture surveyed 10,000 people in the USA, France, Germany, Brazil, Italy, Japan, India and China regarding their digital experiences before, during and after buying a car.

Online/Digital Vehicle Purchasing is Increasing in Popularity

53% would organize an online vehicle pick-up after service.

36% already use online channels to narrow down their search for a vehicle as an initial step to the path to purchase.

54% want information tailored to their needs while researching a new car via online channels.



63% stated they would consider purchasing a new car in an online auction.

50% would sell or trade in an old car online.

53% stated they would consider buying a new car online.
16% have already done.

22% believe customers will be able to buy, finance and have a car delivered completely via an online interaction.

Digital Services are in Demand

Over half of respondents selected digital services that were appealing to them in a car dealership, indicating the appetite for digital services is growing.



A high demand for digital services are not only restricted to emerging economies. American, Chinese and Brazilian respondents wanted an increase in digital services.

Emerging Economies Have a Larger Appetite for Digital Disruption in the Automotive Industry

Emerging economies show stronger signs of accepting the Automotive industry to be disrupted by digital and online means.



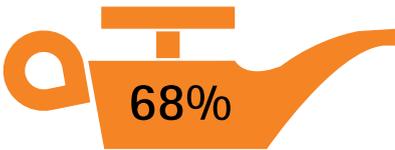
53% of Chinese respondents stated that they would definitely purchase a car online. 25% of Chinese and 26% of Brazilian respondents believe that customers will buy, finance and have a car delivered, using only online interactions.



90% Chinese, 78% Indian and 75% Brazilian consumers will buy a new car in an online auction, compared to 35% French and 45% German consumers.

Freebies Incentivize Consumers

Overall, consumers are incentivized by free offers or discounts.



68% stated that free oil changes/maintenance would influence their purchase of a new car.



69% would like to hear of special offers/discounts from their dealer or manufacturer.

New vs Used Cars?



20% of German and 23% of Brazilian consumers were more likely to purchase a used car compared to other countries purchasing new vehicles.

Online Search



Personalization would make online car search easier according to 54% of respondents. This is particularly of interest to 60% of Indian and American consumers and 62% of Chinese consumers. 70% of Indian consumers would value more comparison sites and 69% of Chinese want augmented reality.

Satisfaction



Germans and Brazilians tend to be "extremely satisfied" with new car purchases whilst the French are the "least satisfied" overall.

Online Purchasing



Although consumers are more comfortable today than two years ago with an entire online vehicle purchase, 53% of Chinese consumers are particularly keen to complete a new car purchase entirely online.

Online Car Purchasing and Digital Demand



Chinese, Americans and Brazilians appear to be more interested in online digital experiences compared to other countries.



Apart from Japan, France and Italy, over 20% of respondents in all countries surveyed believe customers will be able to buy, finance and have a car delivered completely via an online interaction.



However, 37% Japanese and 23% French believe car purchasing cannot be disrupted by digital, compared to only 5% of Chinese, 6% of Indian and 7% of Brazilian respondents.

About Accenture

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