



Expectations of automotive customers when buying and using vehicles

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

21 December 2020

Presenting today

1. Traditional car purchasing
2. Innovative car purchasing
3. Aftersales service
4. Electric vehicles & connected cars
5. Discussion



Our purpose

Building a better working world



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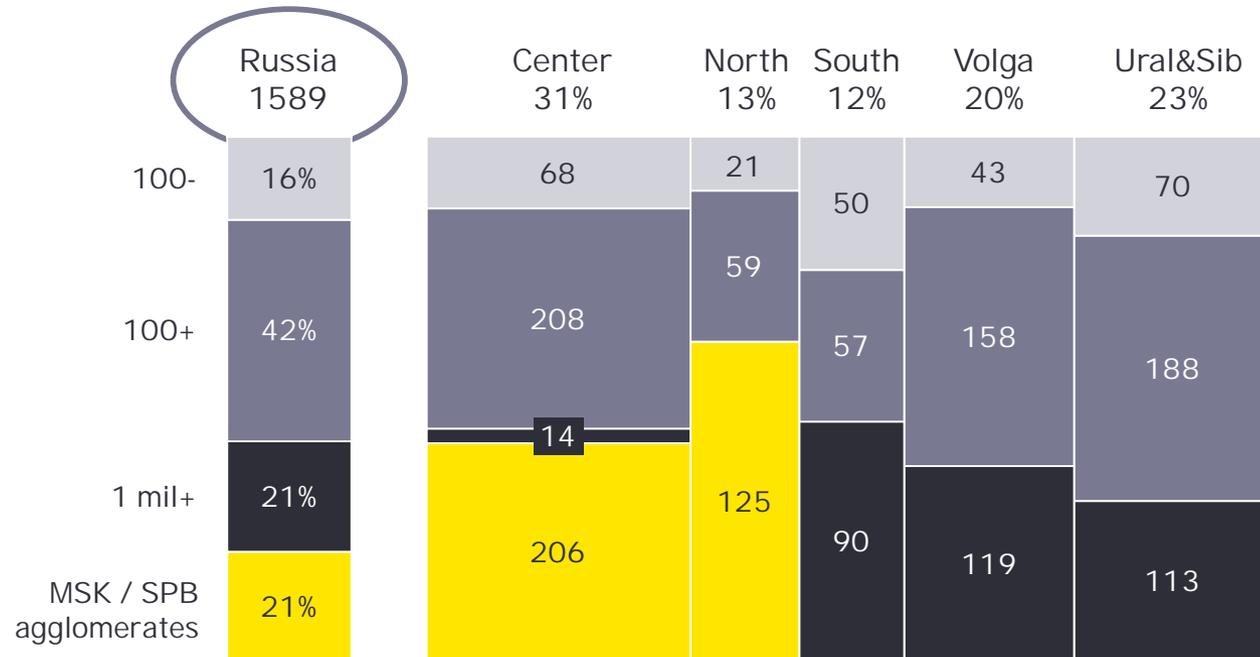
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Details of the methodology of the survey

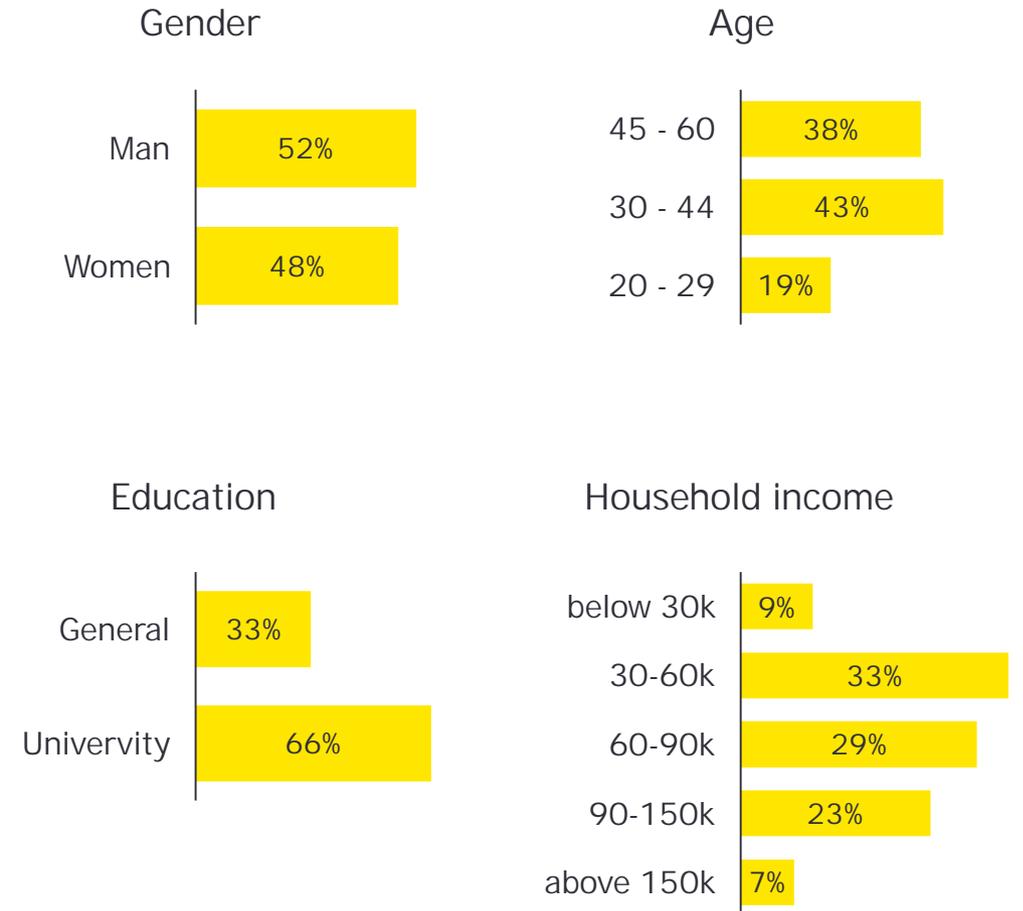
Distribution of respondents (phone interviews) across regions



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.

Distribution by demographic & social groups





1

Traditional car purchasing

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?

70%

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

11%

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

7%

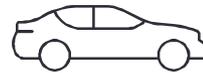
Yes, I will take over the car in the dealership, but I will take the remaining steps online

6%

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

2%

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



47%

The situation did not affect my planned purchase of a car



9%

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



10%

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

Purchase plans

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



Hungarians
56%



Romanians
49%



Czechs
69%



Turks
29%



Hungarians
20%



Romanians
15%



Czechs
14%



Turks
11%



Hungarians
4%



Romanians
10%



Czechs
5%

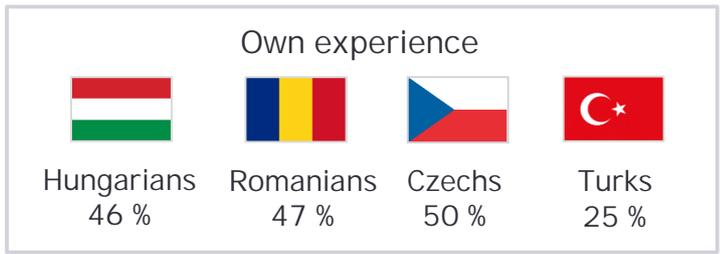
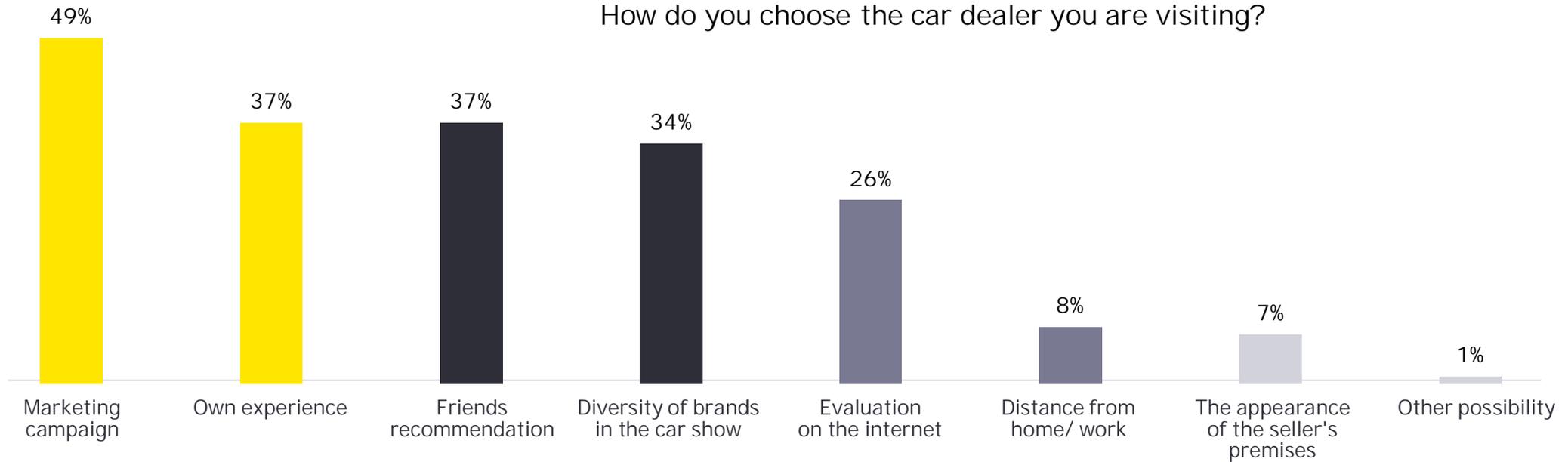


Turks
18%



The COVID-19 pandemic has significantly affected car purchase plans as more than half of Russians feel affected by this situation. One in five Hungarians postpone the purchase until the purchase of the car is strictly necessary.

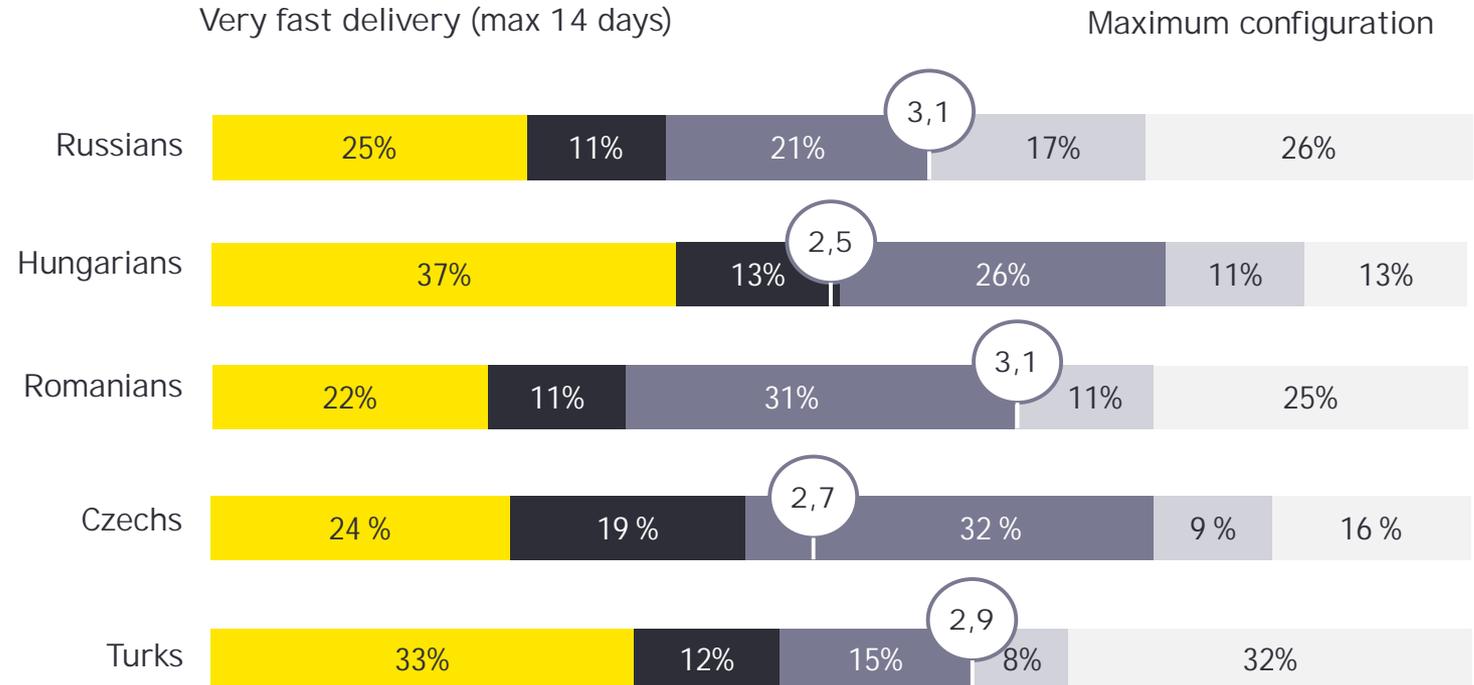
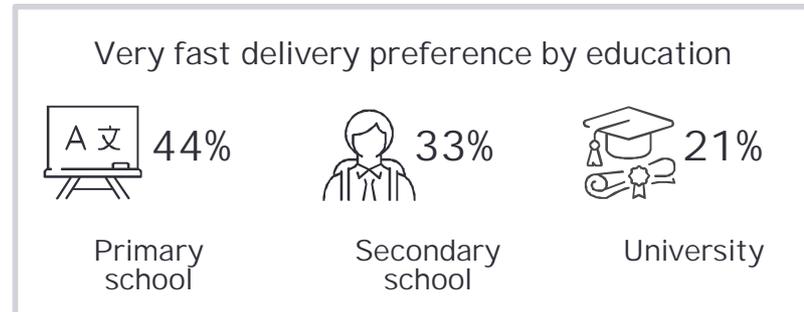
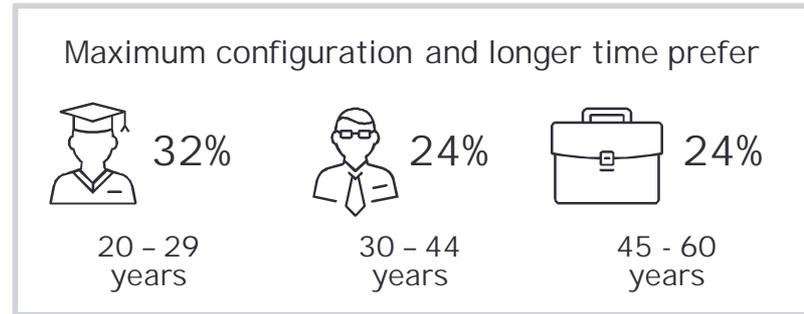
How do I choose a dealer?



Russians and Turks are strongly responsive to marketing campaigns. Czechs, Romanians and Hungarians rely mostly on their own personal experience and recommendations from friends.

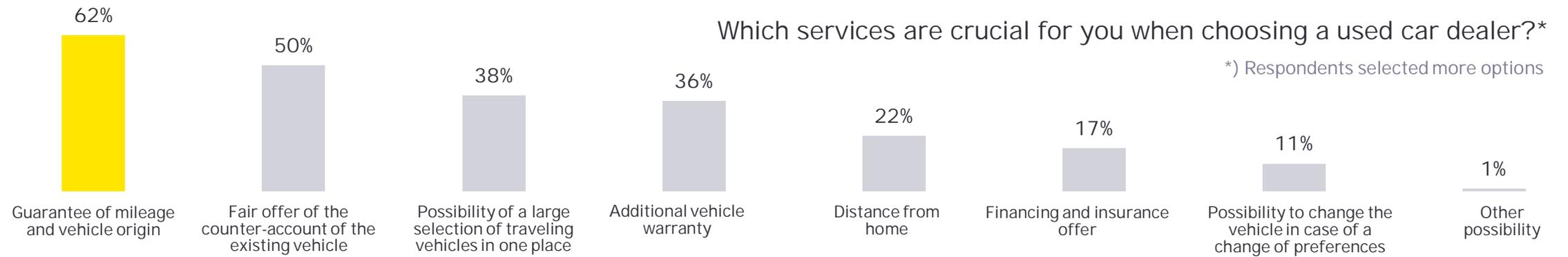
Am I going to wait for my new car?

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 (about 1/2 year)?

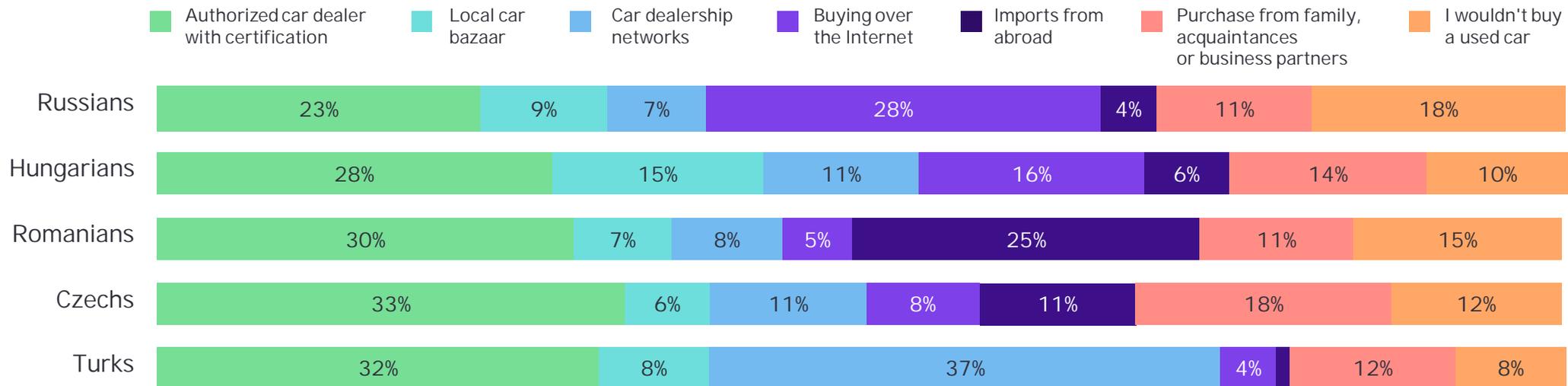


The very fast delivery and maximum configuration option prefer approximately the same proportion of Russian drivers. Both options on the other hand are decreasing with the higher level of education and also the higher age.

How do I decide when buying a used car?



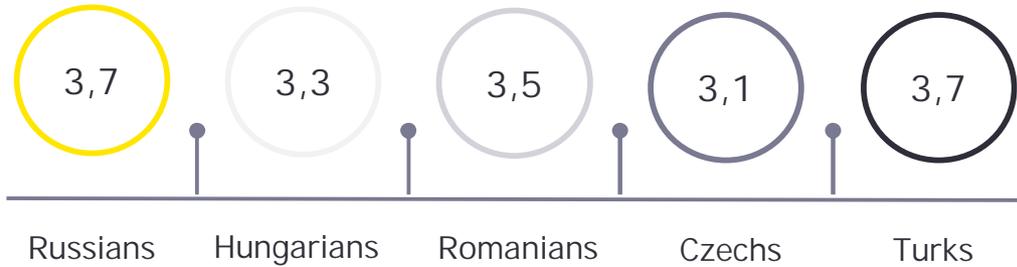
What option would you most likely choose when buying a used car?



The guarantee of mileage and the origin of the vehicle is a key element for Russian drivers when choosing a used car. The most preferred option is a purchase over the Internet followed by an authorised certified dealer option.

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

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



37%

20 - 29 years



33%

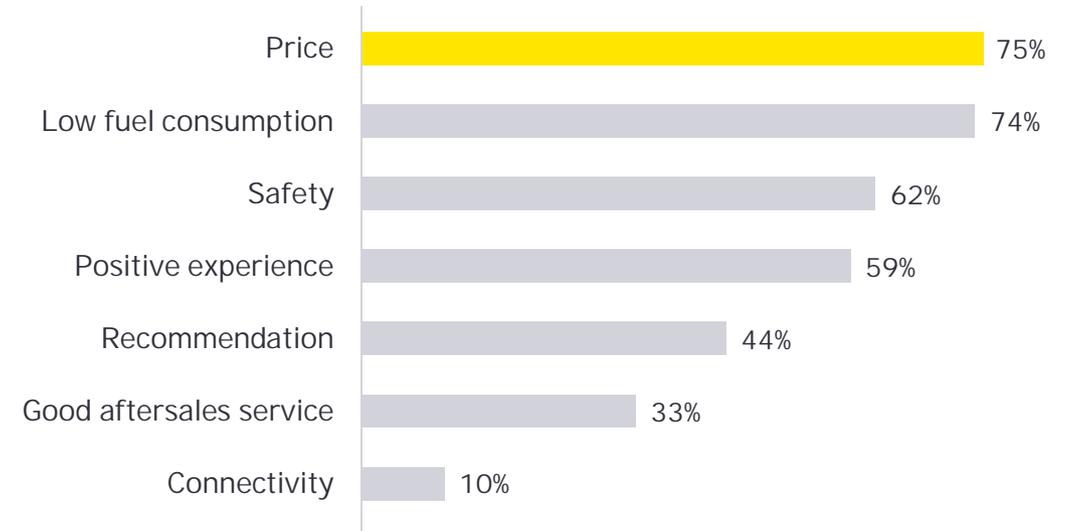
30 - 44 years



30%

45 - 60 years

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



*) Respondents selected more options.

Good after-sales service appreciate



38 % Hungarians



22 % Romanians



30 % Czechs



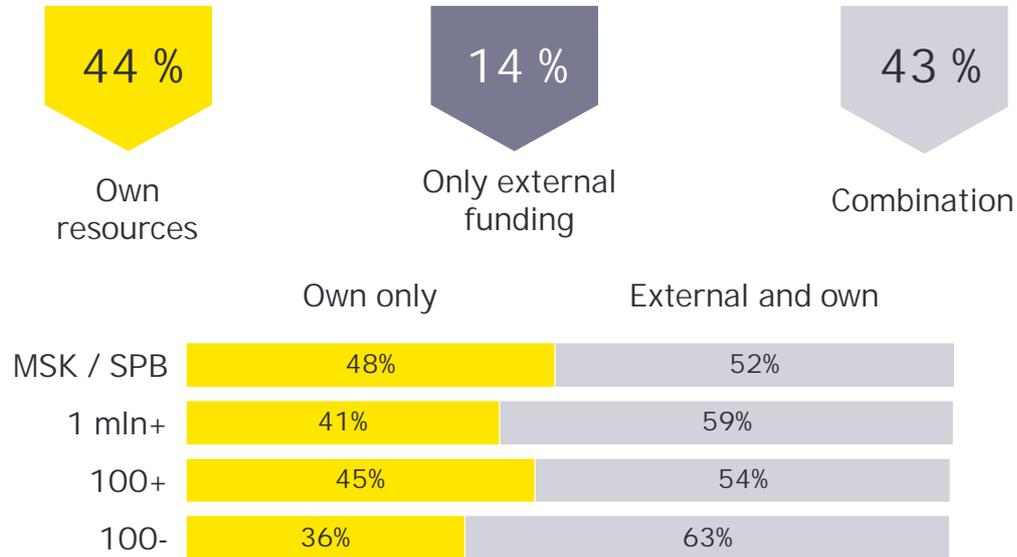
39 % Turks



The most important factors for Russian drivers in regard to car brand are price and low fuel consumption of the car. The importance of the car brand is decreasing with the age of respondents.

Where do I get enough funding?

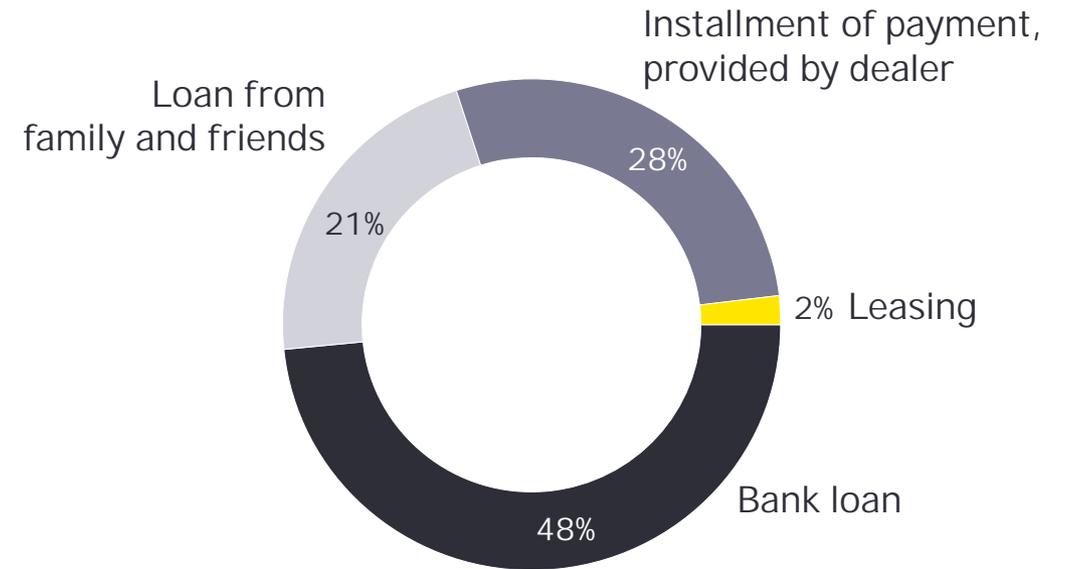
What is the most likely method of financing when you buy your next car?



External resources are required for

- ▶ 75% new car purchases
- ▶ 25% used car purchases

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



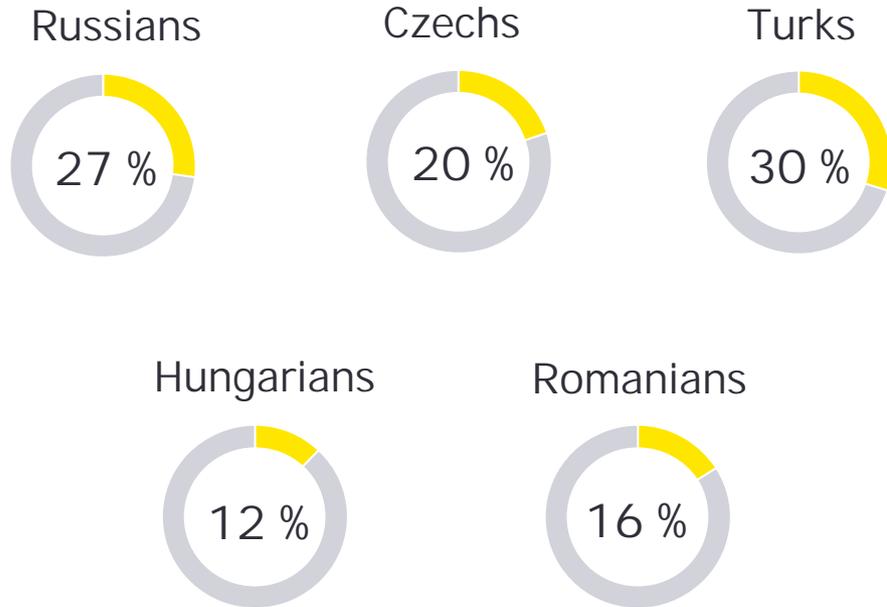
About half of car purchases are financed by bank loans, leasing in Russia is not popular in the private segment

An aerial, high-angle photograph of a multi-lane highway interchange at night. The scene is illuminated by the headlights and taillights of several cars traveling through the curves of the road. The overall tone is dark and moody. A large, semi-transparent, grey number '2' is overlaid on the left side of the image, partially obscuring the road. The text 'Innovative car purchasing' is written in a bright yellow font across the middle of the '2'.

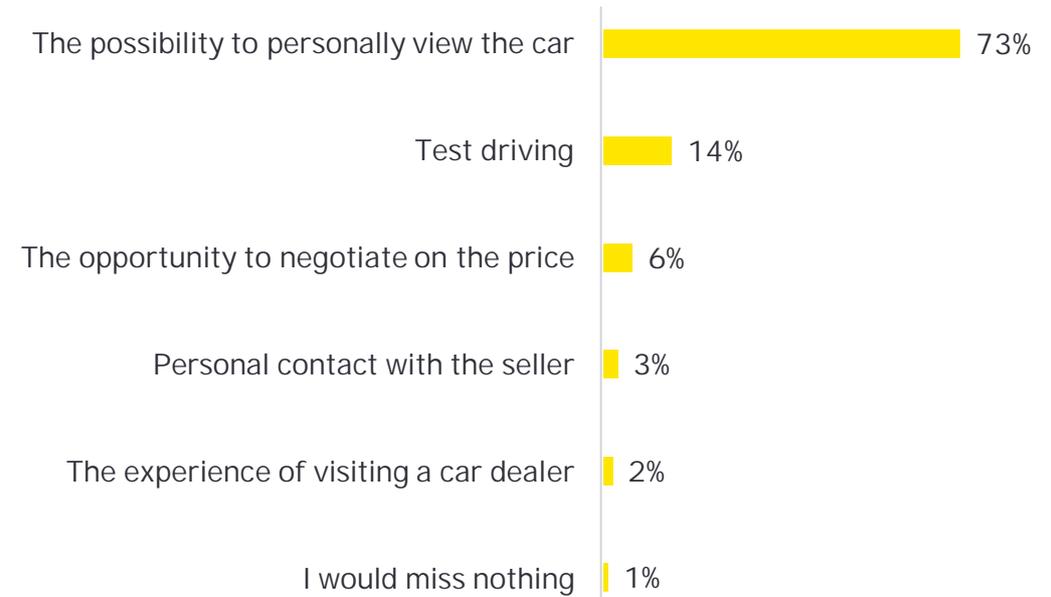
Innovative car purchasing

Am I willing to buy my car over the Internet?

Can you imagine buying a car over the internet?



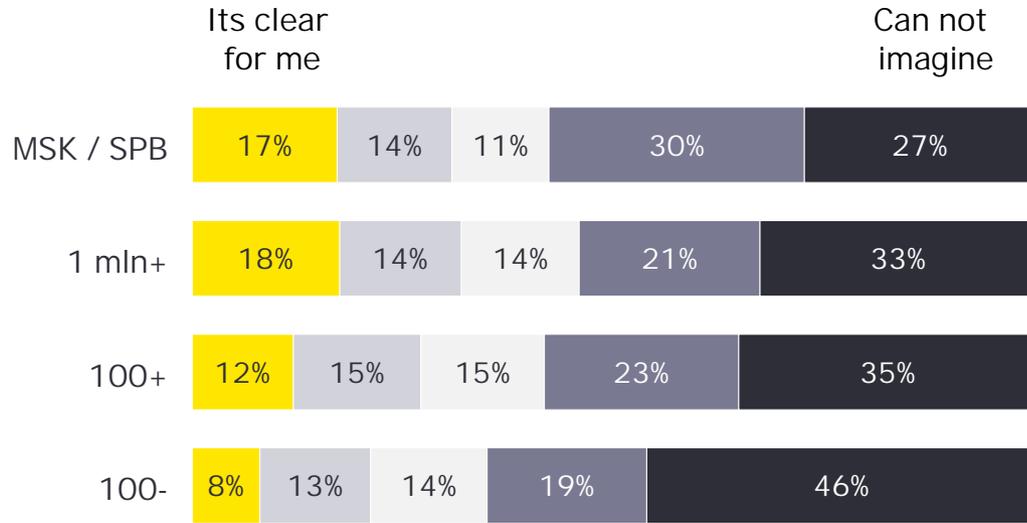
What would you miss the most when shopping over the internet?



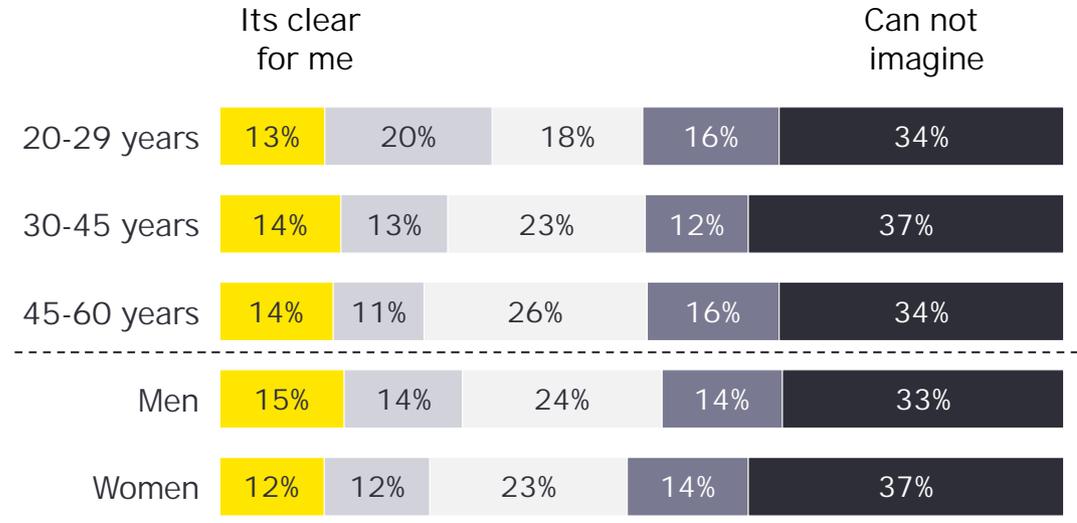
Interest in buying a car over the Internet is the highest amongst Russians and Turks. Almost 75 % of Russian respondents would miss the opportunity to view the car in person.

In Moscow and St. Petersburg about 45% of young customers below 30 you are ready to consider online purchase of the car

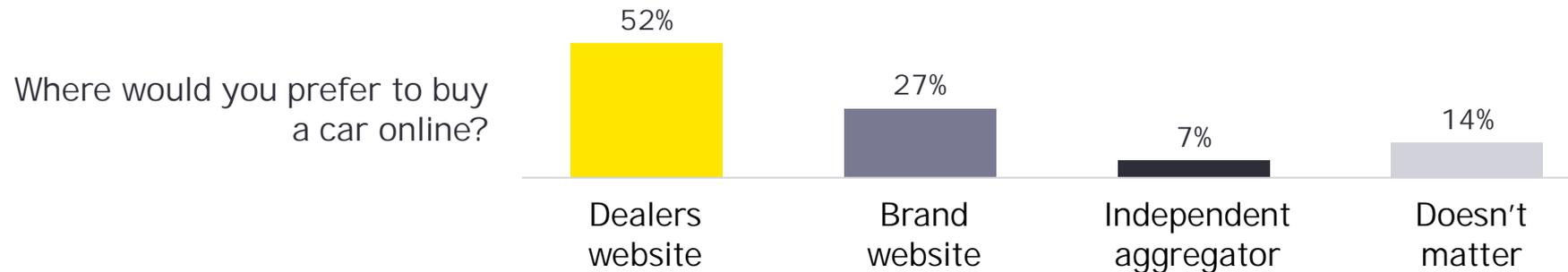
Can you imagine buying a car over the internet?



Both men & women, any age

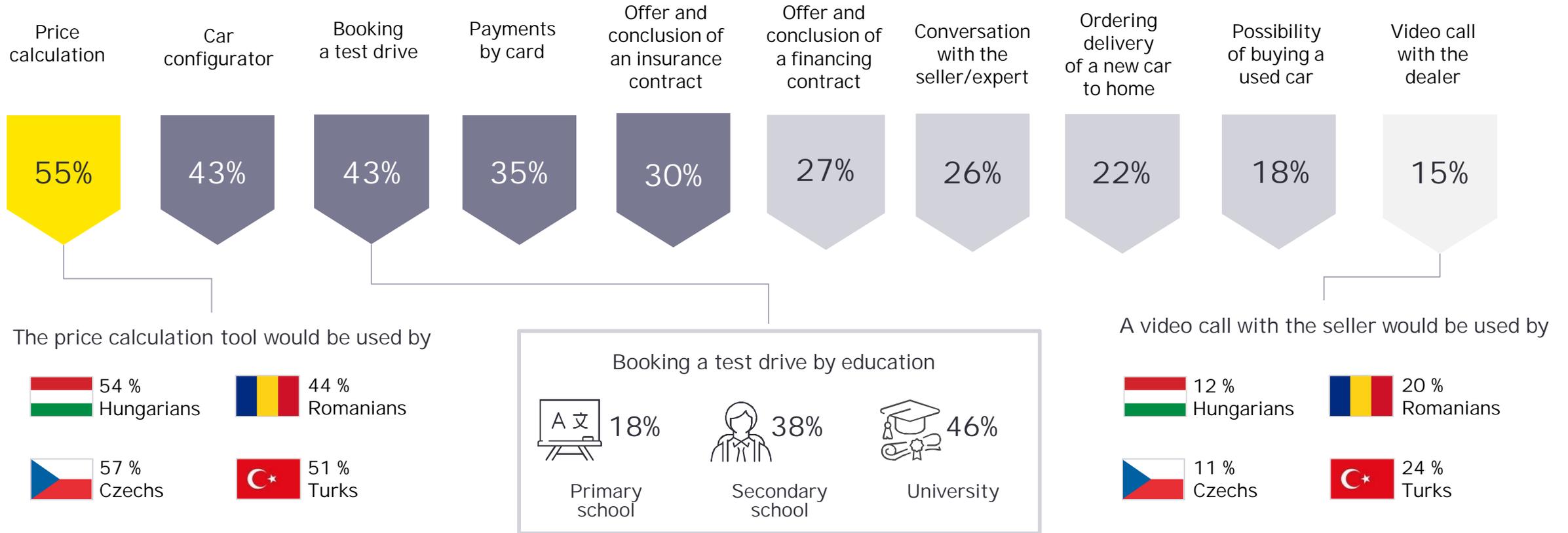


All cities & regions



What services do I expect when buying over the Internet?

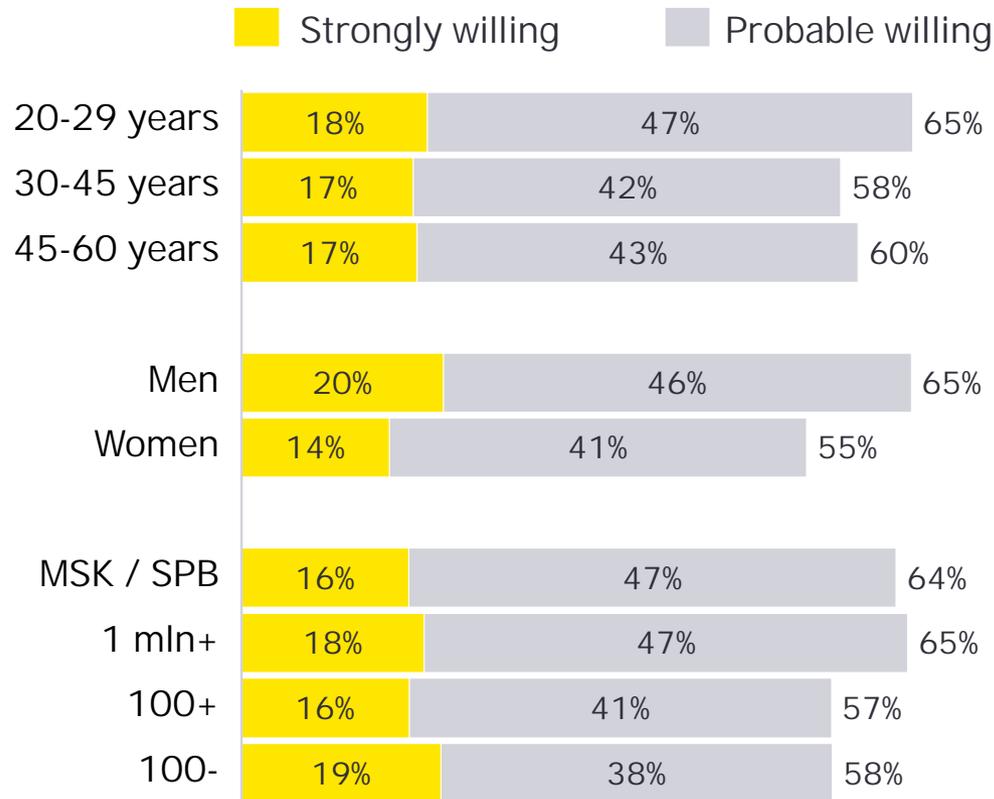
If you had the option to use these online tools, which would you use during a new car purchase?*



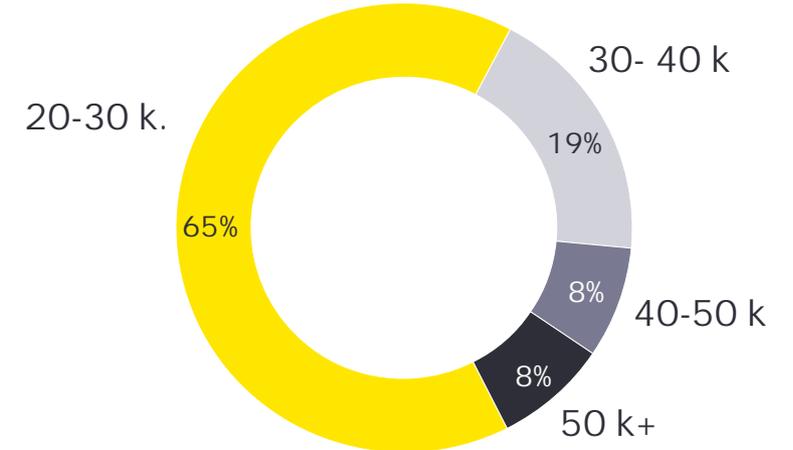
The price calculation and car configuration option represent the most important online tools. The interest in the booking of test drive grows with the level of education.

About 60% of customers are ready to think about car subscription instead of ownership, about 2/3 consider 20-30k RUB as a reasonable monthly fee

Would you be willing to pay a subscription fee that would allow you to replace your car models according to your current needs for a certain monthly fee?



What could be the reasonable car subscription fee, rubles per month?



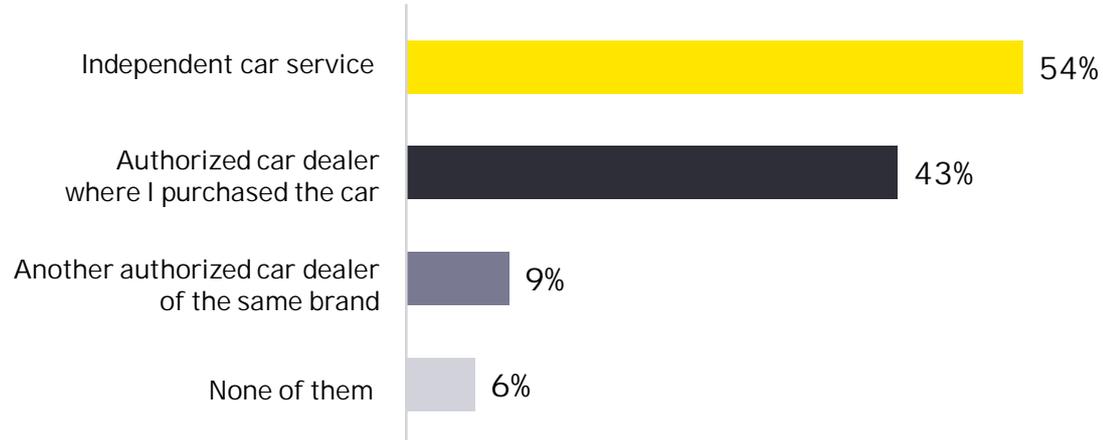
Potential buyers of more expensive cars are willing to consider a subscription more often than in the budget segment

An aerial, high-angle photograph of a multi-lane highway interchange at night. The scene is illuminated by streetlights and the headlights of several cars traveling on the road. The cars are small, dark shapes against the lighter pavement. The background shows a blurred landscape with some trees and distant lights. A large, semi-transparent, grey number '3' is overlaid on the left side of the image, partially obscuring the highway. The text 'Aftersales service' is written in a bright yellow, sans-serif font across the middle of the '3' and the highway.

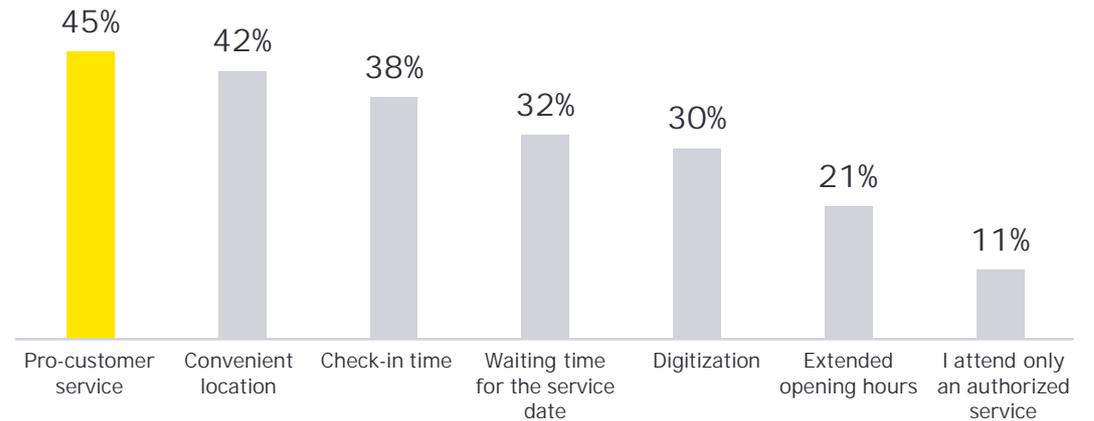
Aftersales service

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?*



*) Respondents selected more options.

The authorized service center will be visited by

 12 %
Hungarians

 23 %
Romanians

 11 %
Czechs

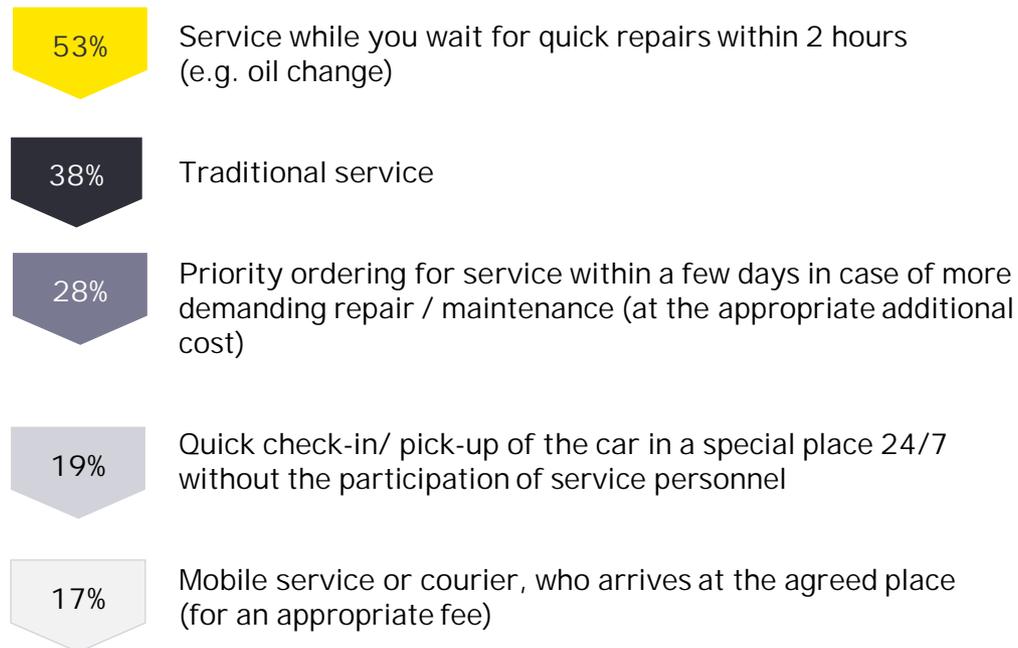
 13 %
Turks



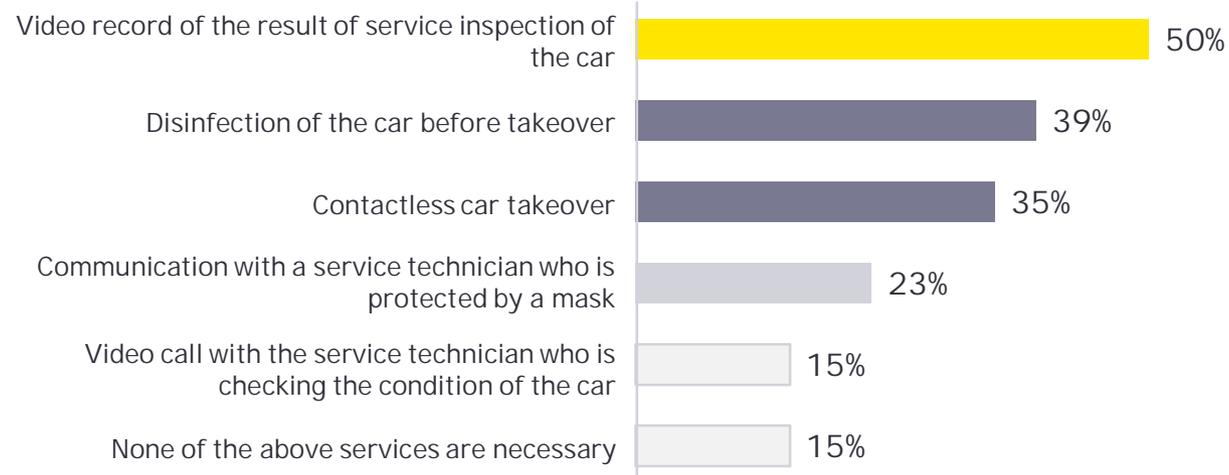
More than a half of respondents prefer to visit the independent car service. The main motivating factors to visit an authorized service center on the next service visit are good pro-customer service and convenient location.

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?*



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



*) Respondents selected more options.

Disinfecting the car before takeover would be appreciated



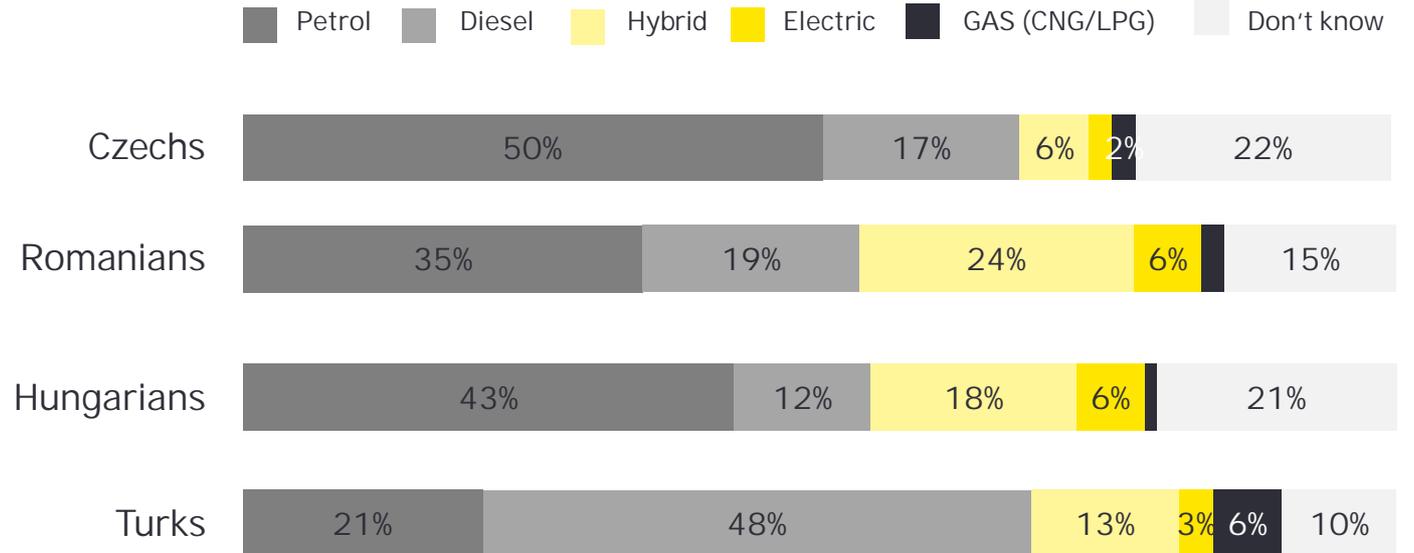
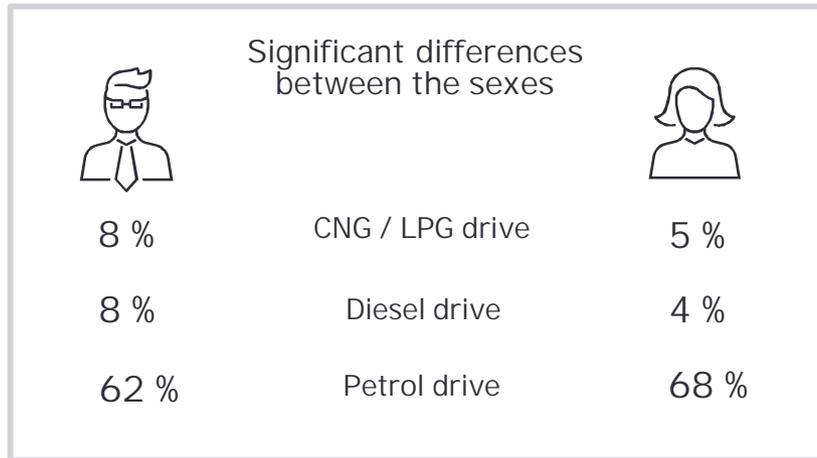
Russians would choose the quick service (within 2 hours) as the ideal way of service. Disinfecting the car before takeover becomes important part of service visit for customers.

An aerial, high-angle photograph of a multi-lane highway at night. The road is illuminated by streetlights, and several cars are visible, their headlights and taillights glowing. The background shows a blurred cityscape or suburban area under a dark sky. A large, semi-transparent number '4' is overlaid on the left side of the image.

4 Electric vehicles & connected cars

What engine will your next car have?

Next type of engine



The petrol engine is by far the most popular amongst Russian drivers. The increased popularity of alternative fuels in Hungary and Romania is due to state support through subsidies.

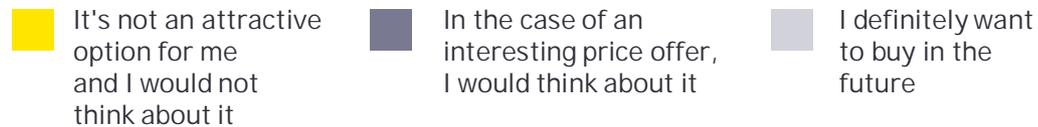
Is electromobility relevant to me?

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

Electric vehicle



Hybrid



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):



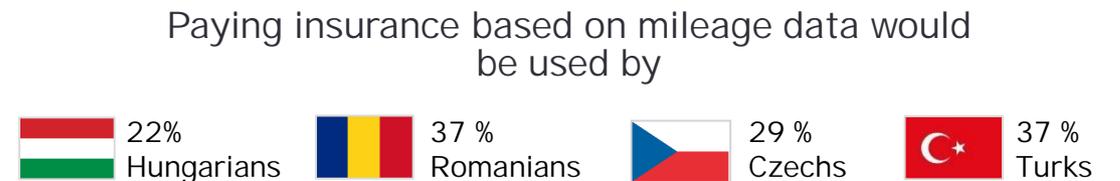
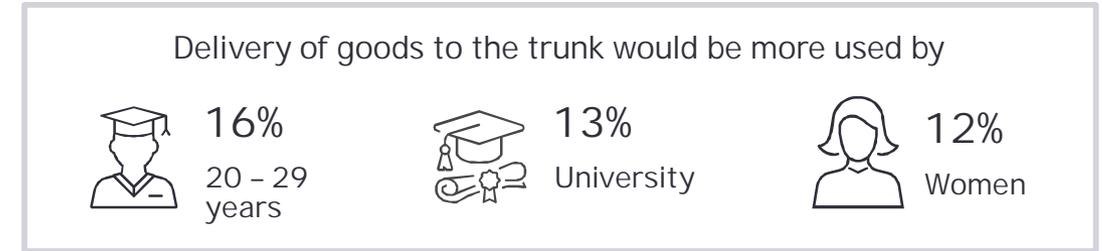
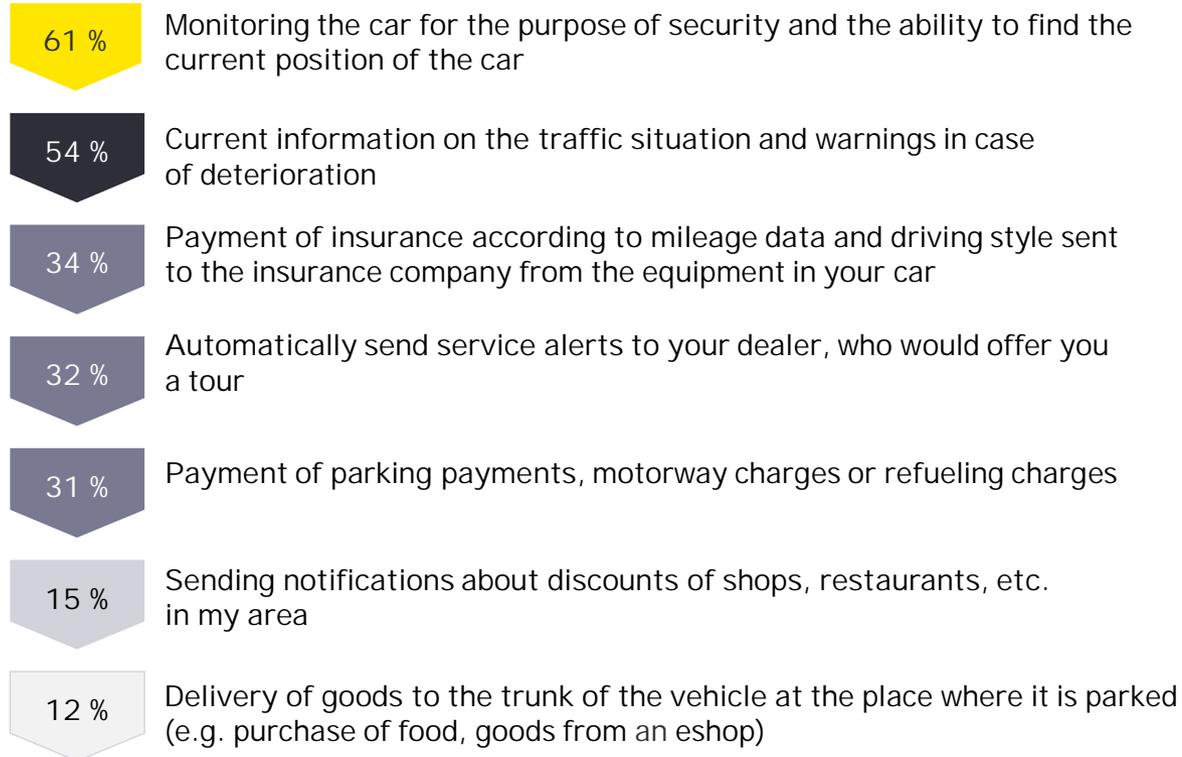
Electric vehicle (E) / hybrid (H) definitely want to buy



The purchase of fully electric car is considered by 58 % and hybrid car by 68 % of Russian drivers. The interest in alternative engines grows with the higher age of respondents.

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?*



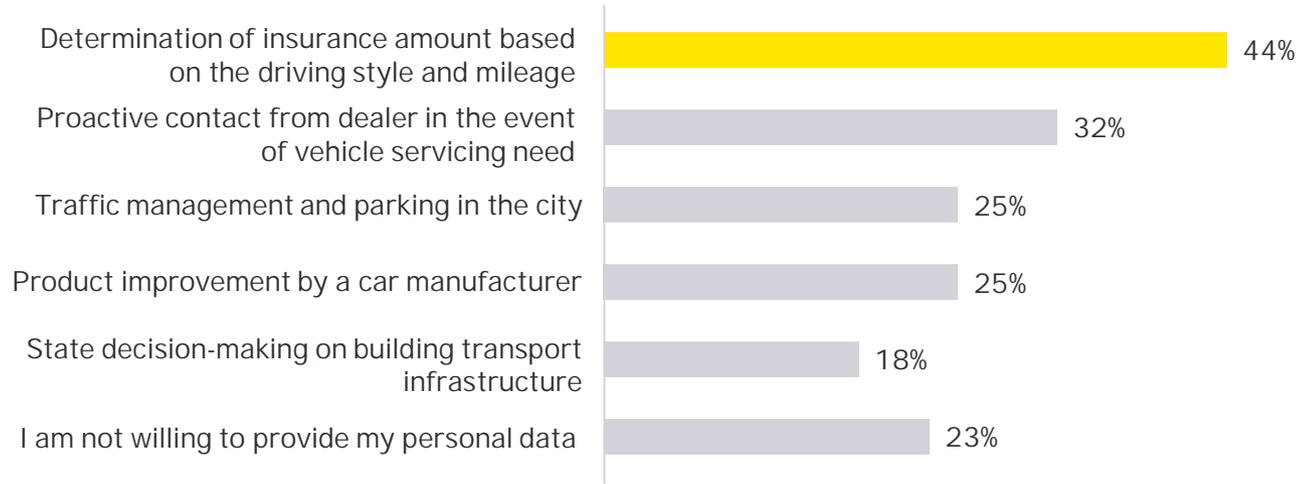
*) Respondents selected more options.



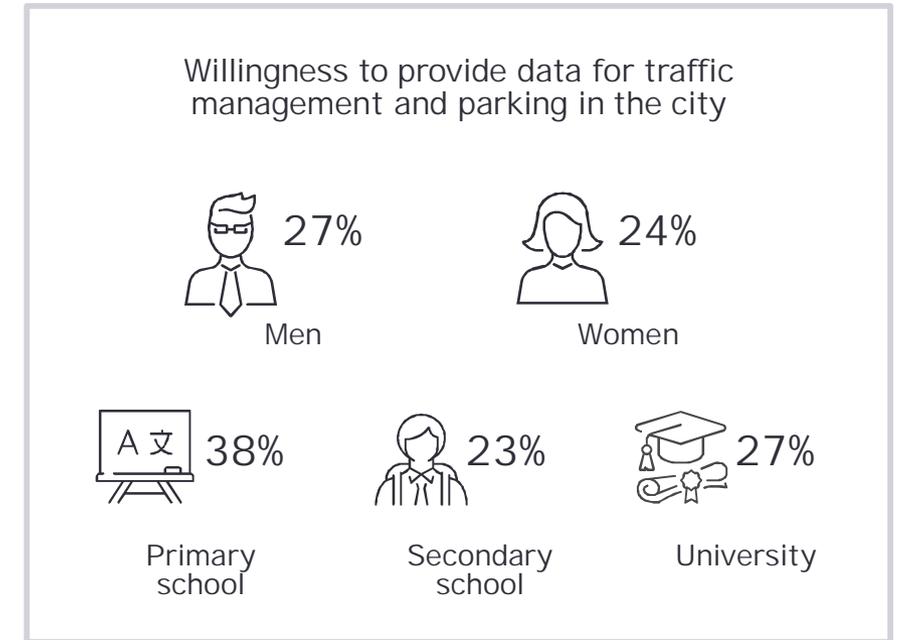
The most preferred features according to Russian drivers are car monitoring for the security reasons and information on the traffic situation. There would be interest in delivering goods to the trunk, especially among younger respondents.

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

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



*) Respondents selected more options.



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



Not willing to provide data



Russians would be willing to provide data to determine the amount of insurance depending on the style of driving and in the event of vehicle servicing need. The reluctance to provide data is the highest in primary school education segment.

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