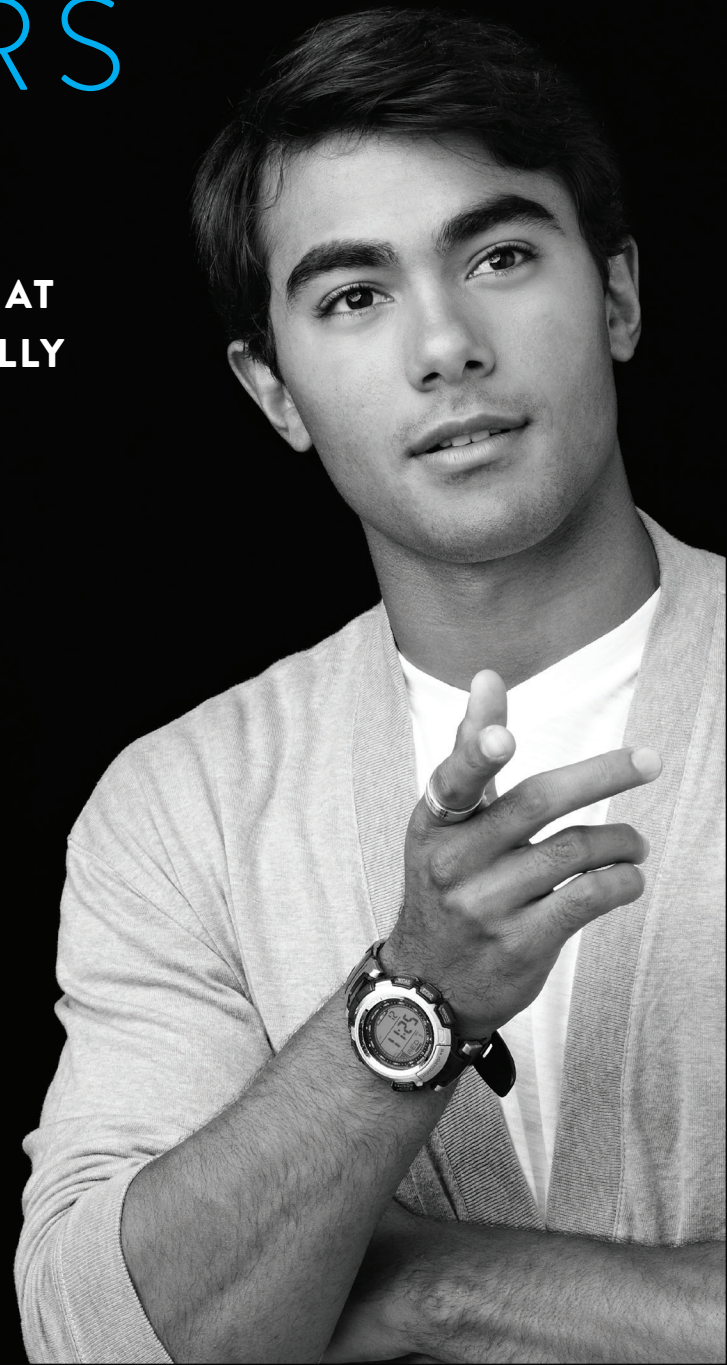




SECURE TOMORROW'S CAR BUYERS TODAY

**FOUR KEY MARKETING STRATEGIES THAT
WILL FUEL INDUSTRY GROWTH GLOBALLY**

APRIL 2014



nielsen
.....

AN UNCOMMON SENSE
OF THE CONSUMER™

CONTENTS

INTRODUCTION / SURVEY METHODOLOGY 3

PART I: WHO'S DRIVING DEMAND AND HOW DO YOU REACH THEM 5

Create a fluid approach for marketing new and used vehicles.	6
Focus more on the emotional connection as the why to buy, particularly for Millennials.....	8
Invest in your own online assets for maximum impact.	11
Drive impact on TV by aligning creative and media approaches. ...	14

PART II: AUTOMOTIVE DEMAND COUNTRY SCORECARDS 17

Developing countries to watch	18
Brazil	19
Russia	20
India	21
China	22
Mexico	23
Indonesia.....	23
Turkey	24
Established auto markets	25
United States	26
Germany	27

PART III: VEHICLE OWNERSHIP AROUND THE WORLD AND EMERGING TRENDS 28

NEW BUYERS DEMAND NEW STRATEGIES

Strategy 1: Create a fluid approach for marketing new and used vehicles.

Strategy 2: Focus more on the emotional connection as the why to buy, particularly for Millennials.

Strategy 3: Invest in your own online assets for maximum impact.

Strategy 4: Drive impact on TV by aligning creative and media approaches.

There's nothing quite like the freedom of owning your own car. The ability to get from point A to point B without reliance on public transportation, friends or family creates feelings of both independence and pride. There is no doubt that people are passionate about car ownership—whether new or used, and new findings from Nielsen show how this passion will drive auto sales across the globe.

Affordability and need are central to the automotive purchase decision-making process, but changing population trends, rising wealth accumulation and growing aspirations are also helping to fuel new demand. This expansion represents good news for automakers, but understanding the motivational factors driving this demand is critical to reaching the right consumers for your products.

“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 the needs and desires of these buyers.”

Nielsen conducted a global online study to find out what motivates the car buyers of tomorrow, where they live and how to reach them. What types of cars will appeal to intended buyers? Are there attitudinal differences between existing car owners and first-time car buyers? In a fragmented media landscape, will advertising in traditional TV and newspaper formats be most effective, or will online and mobile platforms resonate more successfully?

“Through this study, we found there are four growth strategies that automotive marketers need to consider,” explains Gardiner. “Ultimately, the research shows that the buyers of tomorrow require a much more nimble and blended marketing approach.”

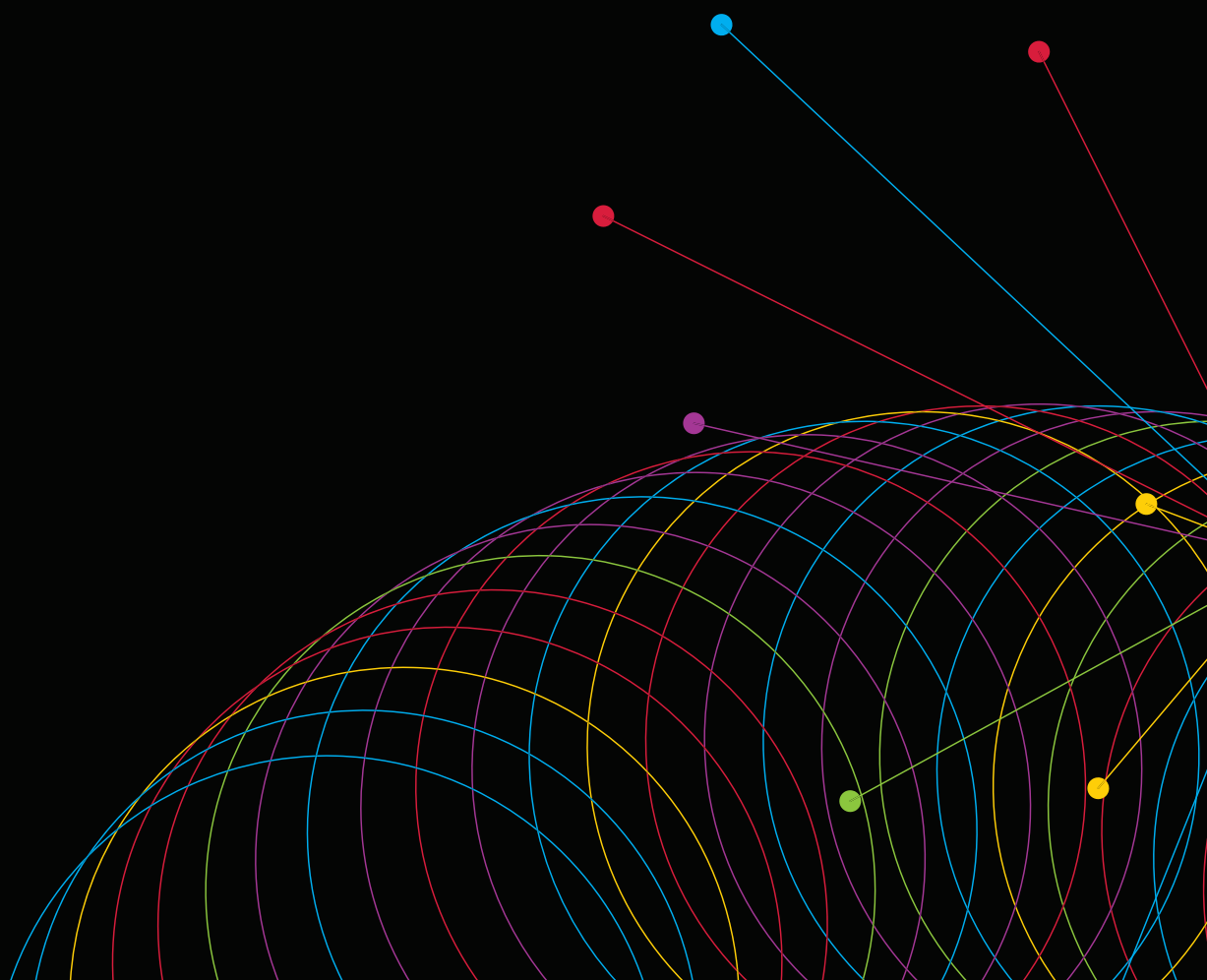
The Nielsen Global Survey of Automotive Demand polled more than 30,000 Internet respondents in 60 countries to identify where automotive demand is greatest and to reveal the emotional as well as the financial motives that are most influential in driving new or used car purchase intent. We’ve integrated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

ABOUT THE GLOBAL SURVEY METHODOLOGY

The findings in this survey are based on respondents with online access across 60 countries. While an online survey methodology allows for tremendous scale and global reach, it provides a perspective only 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.

PART I:

WHO'S DRIVING DEMAND AND HOW DO YOU REACH THEM



STRATEGY 1:

CREATE A FLUID APPROACH FOR MARKETING NEW AND USED CARS

“Purchase needs and aspirations for new rather than used car buyers are quite fluid, albeit in dramatically different ways around the world, and particularly in mature markets where online shopping happens seamlessly for both,” said Gardiner. “How you influence consumers as they shift between vehicles is a key step in the purchase process across the industry and the globe.”

According to Nielsen’s global online survey of automotive purchase intent, 65 percent of respondents across 60 countries plan to buy a new or used car in the next two years. Demand, as expected, will be strongest in Latin America (75%), Middle East/Africa (75%) and Asia-Pacific (72%), where three or almost three out of four respondents intend to buy a car. 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.

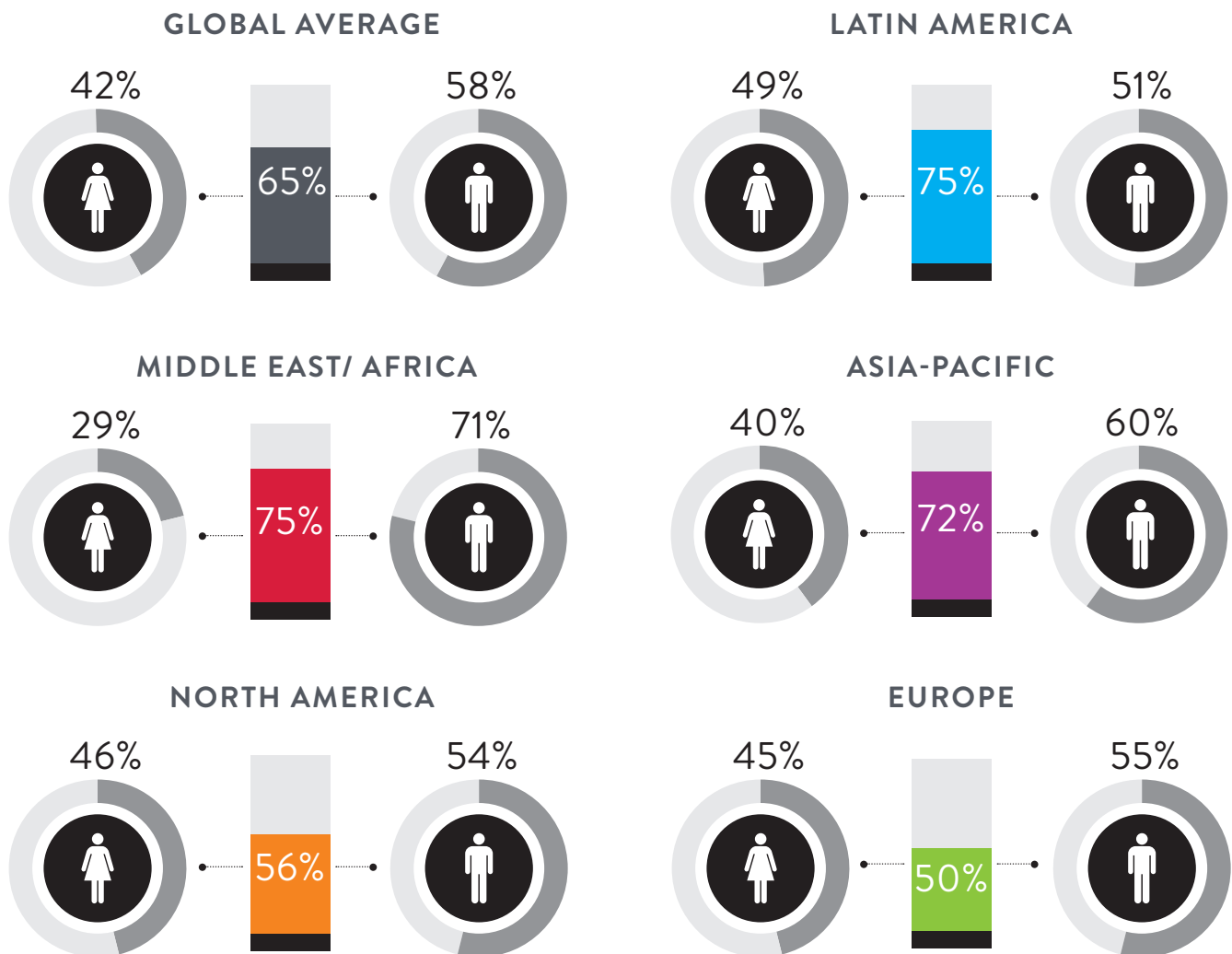
Not surprisingly, new car purchase intent is strongest in Asia-Pacific, where 65 percent of respondents say they will buy new, compared with only 7 percent that plan to buy used. In the region, this new car demand will be driven by consumers in India (77%), China (76%), Thailand (68%) and Indonesia (63%), where the expectation to buy is highest. While new car purchase intent also dominates in Latin America (47% new vs. 28% used), Middle East/Africa (45% new vs. 30% used) and North America (34% new vs. 22% used), the ratios of new to used car purchase intent in these regions are smaller. Meanwhile, in Europe, more respondents plan to buy a used (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 you to fine-tune your marketing strategies to address the unique needs of the buyers in your market.”

Whether new or used, total car-buying intentions, as expected, are greatest across the developing country landscape, with demand in India (83%), Brazil (82%), Indonesia (81%), Thailand (79%), Mexico (79%) and China (78%) at the top of the list. While men dominate the gender profile of prospective buyers in India (82% men vs. 18% women) and Indonesia (66% men vs. 34% women), women represent an equal force of future buyers in Brazil (50% men vs. 50% women), China (55% men vs. 45% women), Mexico (52% men vs. 48% women) and Thailand (52% men vs. 48% women).

AUTOMOTIVE DEMAND AROUND THE WORLD

PERCENT WHO INTEND TO PURCHASE A NEW OR USED CAR IN THE NEXT TWO YEARS



Source: Nielsen Global Survey of Automotive Demand, Q3 2013

FOCUS MORE ON THE EMOTIONAL CONNECTION AS THE WHY TO BUY, PARTICULARLY FOR MILLENNIALS

As auto marketers know, connecting with how people feel as much as how they think can be a powerful motivator. The role the car plays in the consumer's life is one key to unlocking the drivers of demand. Is it for utility—simply a mode of transportation to get you from one place to another? Is it to express status—a symbol of the success you've achieved in life? Or is it more purely emotional—you just love to drive? While each of these sentiments may play a role in the car-buying decision process, connecting with the emotions that pull at the heartstrings draws consumers more powerfully along the path to purchase.

“Understanding the motivators of car-buying intenders allows marketers to create messaging that will resonate strongly,” said Gardiner. “If you 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 your strategies are proactive and aligned with their wants.”

As noted, practicality issues aside (not surprisingly, financial motivators are the strongest sentiment expressed globally among existing car owners [89%] and first-time car buyers [91%] who intend to buy a car in the next two years), the biggest trigger of automotive sales is purely emotional. Among existing car owners in the market to buy a car, 84 percent expressed a love of driving, which is significantly higher than the desire to fulfill a utilitarian purpose (63%) or to represent a symbol of success (62%).

But age matters. Global Millennial respondents (age 21–34) are particularly motivated by status. Compared to respondents who are over age 35, Millennial car owners are 68 percent more likely to say the car they drive is a symbol of their success. Millennial first-time car buyers are 25 percent more likely than older age cohorts to believe a car is a status symbol. Interestingly, the research shows that status motivators are important for those who are on the cusp between low and high income groups—those who are typically just able to afford a car.

“AUTOMOTIVE MARKETERS ARE WELL AWARE OF THE POWER OF EMOTIONAL CONNECTIONS FOR CAR BUYERS,” EXPLAINS GARDINER, “THE KEY IS MAKING SURE THESE MESSAGES ARE CLEAR AND RESONATE THROUGH THEIR CAMPAIGNS TO THE RIGHT AUDIENCES.”

While the love of driving as a purchase motivator among existing car owners is greatest in Asia-Pacific (86%), three-quarters of respondents in the region are also spurred by the desire for status (75%), followed by the need for utility (69%). It stands to reason that the emotional “love to drive” connection for first-time car buyers in Asia-Pacific is not as strong (73%) as it is for existing car owners; status (61%) and utility (61%) are equally important motivators, albeit to a lesser extent. Similarly, in the Middle East/Africa and Latin America regions, a love of driving among existing car owners (85% Middle East/Africa; 83% Latin America) and status (69% Middle East/Africa; 49% Latin America) are strong motivators, followed by utility reasons (56% Middle East/Africa; 44% Latin America).

The attitudinal motivators among existing car owners in North America and Europe who intend to buy are similar to one another, with more respondents citing utilitarian reasons (71% North America; 56% Europe) than status intentions (51% North America; 42% Europe). Still the love of driving (80% North America; 82% Europe), while not as strong a motivator in these regions as in Asia-Pacific or Middle East/Africa, trumps utility and status.

MOTIVATIONS THAT WILL DRIVE FUTURE CAR SALES

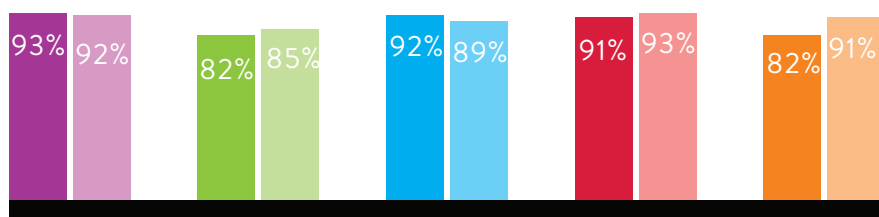
PERCENT WHO INTEND TO BUY A NEW OR USED CAR IN THE NEXT TWO YEARS

● ASIA-PACIFIC ● EUROPE ● LATIN AMERICA ● MIDDLE EAST/AFRICA ● NORTH AMERICA



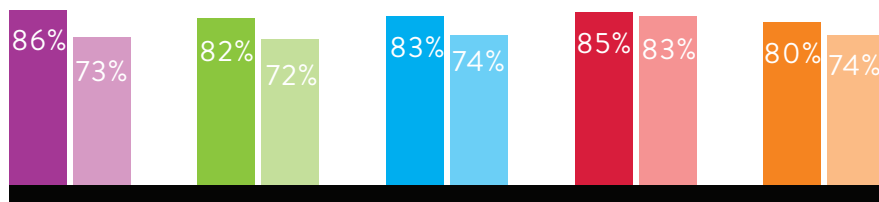
FINANCE MOTIVATORS

I INTEND TO UPGRADE WHEN I AM FINANCIALLY ABLE (EXISTING OWNERS)
I WOULD HAVE A CAR IF I COULD AFFORD ONE (FIRST-TIME BUYERS)



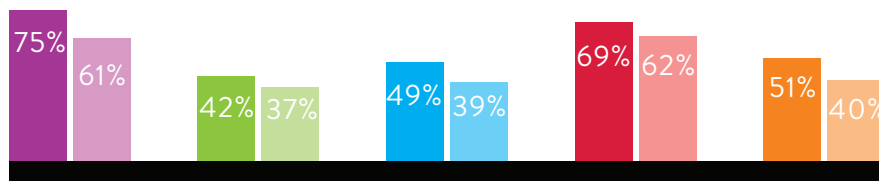
EMOTION MOTIVATORS

I LOVE DRIVING



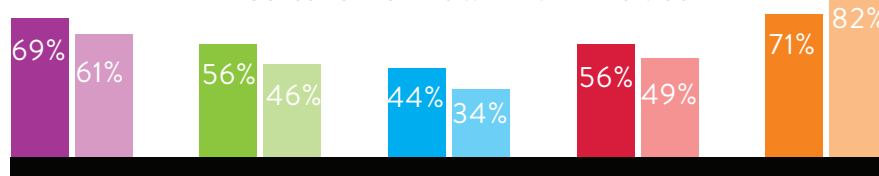
STATUS MOTIVATORS

A CAR IS A SYMBOL OF MY SUCCESS



UTILITY MOTIVATORS

ACCESS TO A CAR IS WHAT MATTERS MOST



CAR OWNERS FIRST-TIME BUYERS CAR OWNERS FIRST-TIME BUYERS CAR OWNERS FIRST-TIME BUYERS CAR OWNERS FIRST-TIME BUYERS CAR OWNERS FIRST-TIME BUYERS

Source: Nielsen Global Survey of Automotive Demand, Q3 2013

TOP COUNTRIES

AMONG CAR-OWNING INTENDERS



FINANCE MOTIVATORS

PHILIPPINES	96%
ROMANIA	96%
CHINA	95%
INDONESIA	95%
LITHUANIA	95%
BULGARIA	95%



EMOTION MOTIVATORS

INDIA	91%
PHILIPPINES	91%
HUNGARY	90%
CHINA	89%
LATVIA	87%
COLOMBIA	87%



STATUS MOTIVATORS

THAILAND	82%
INDIA	81%
CHINA	79%
PHILIPPINES	79%
EGYPT	79%



UTILITY MOTIVATORS

SOUTH KOREA	86%
SLOVENIA	81%
INDONESIA	78%
SINGAPORE	74%
THAILAND	74%
UNITED KINGDOM	74%
ITALY	74%

STRATEGY 3:

INVEST IN YOUR OWN ONLINE ASSETS FOR MAXIMUM IMPACT

The fragmented media landscape offers a dizzying array of ways to reach a consumer inundated by choice. To cut through the clutter and leave a lasting impression, we must connect with consumers via the methods they find most helpful. From traditional media outlets—such as TV, newspapers, magazines and radio—to still-developing online and mobile platforms, it can be difficult to know which method offers the best way to reach your intended audience.

While a mix of advertising across media platforms typically proves most effective, findings from Nielsen's Media Consumption Survey from 2012–2013 in 11 countries show that advertising via online platforms resonate most helpful when buying a new vehicle.

“As consumers seamlessly shift viewing between screens, so too must our marketing strategies,” said Gardiner. “But a one-size-fits-all strategy doesn't work when it comes to messaging across platforms. Adjusting to how different audiences use media is critical for maximum impact.”

Nearly half (46%) of all respondents say that automotive advertising via websites is “very helpful” when considering the purchase of a new car, compared with 42 percent who deem advertising on TV very helpful, 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%) of respondents find websites very helpful, followed by Brazil (69%), China (60%), Thailand (58%) and Russia (51%).

But which websites are most informative? Automotive brand websites are voted most helpful among 65 percent of all respondents when considering an auto purchase, with India (80%), Thailand (79%), China (77%), Brazil (73%) and Russia (73%) exceeding the average.

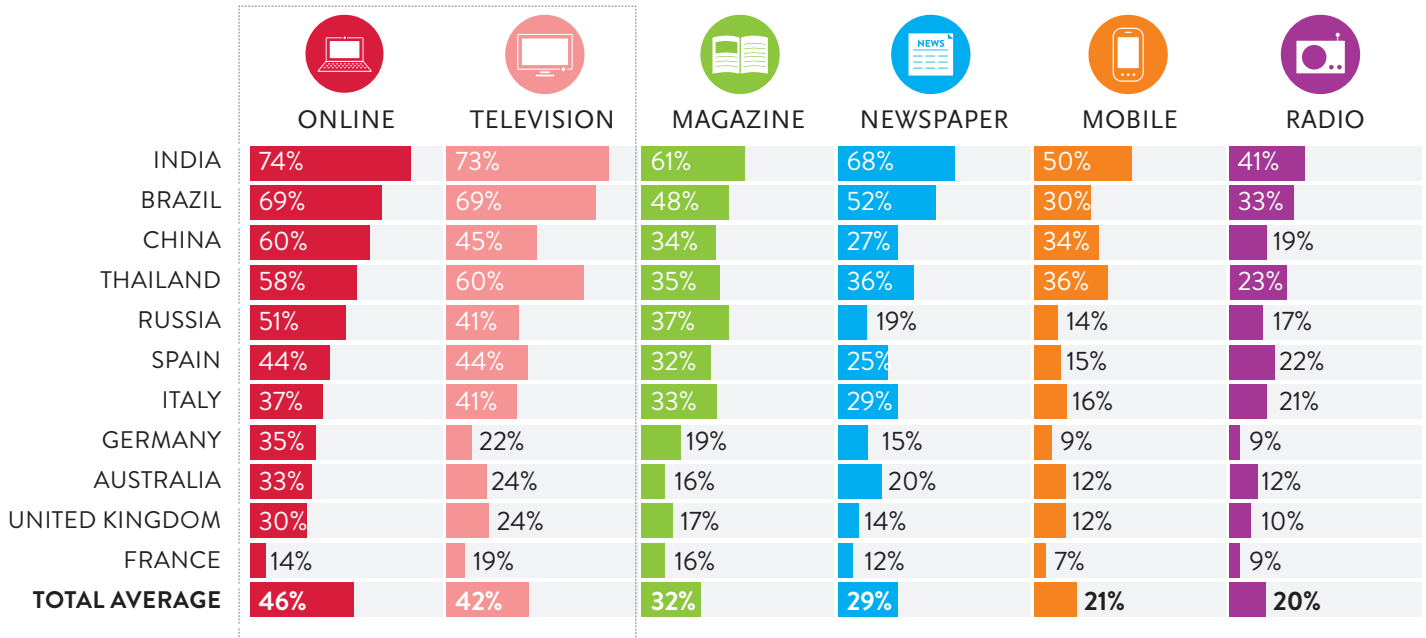
Professional product review websites, which include trusted sources like *Consumer Reports* and the Insurance Institute for Highway Safety, are most helpful for 41 percent of respondents. Other third-party informational websites (e.g., Edmunds or Kelley Blue Book) and dealership websites are each voted most helpful among 38 percent of total respondents.

One-third of all respondents (34%) find social media sites most helpful, with those in Russia (73%), China (49%) and India (43%) exceeding the average. About one-fourth (23%) say video sites with product demonstrations are most useful.

“Among online consumers, Original Equipment Manufacturer (OEM) branded websites, in particular, are key touch points for buyers looking for emotional triggers to help decide which vehicle to buy,” explains Gardiner. “Tailoring content to these needs will help secure this demand.”

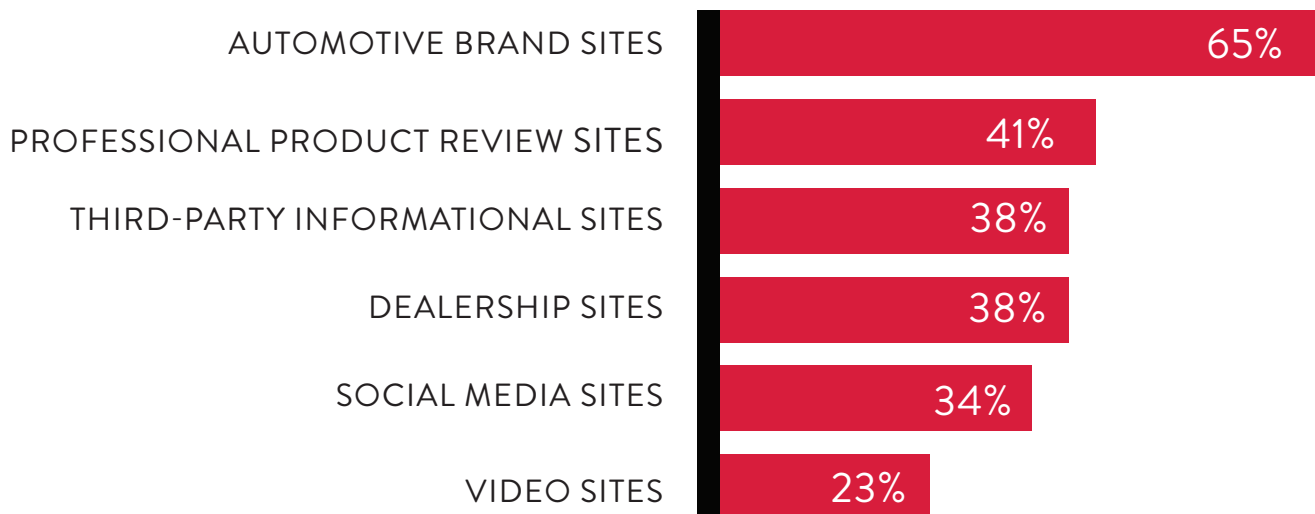


AD PLATFORMS “VERY HELPFUL” WHEN CONSIDERING AN AUTO PURCHASE



AUTOMOTIVE BRAND WEBSITES ARE VOTED MOST HELPFUL WHEN MAKING A PURCHASE

11-COUNTRY AVERAGE



Source: Nielsen Media Consumption Study, 2012

STRATEGY 4:

DRIVE IMPACT ON TV BY ALIGNING CREATIVE AND MEDIA APPROACHES

Getting the media mix right is critical to reaching your intended audience, but ensuring that your advertising message resonates effectively is just as important. Nielsen Brand Effect's syndicated automotive study for TV ad effectiveness across 13 countries analyzed a number of automotive brands and their ads to understand how real TV viewers remember the ads to which they were exposed.

Nielsen Brand Effect measures memorability—how well the ad was recalled; brand communication—how well the ad communicated the brand; breakthrough—the overall impact of the ad; message communication—how well the ad communicated the key message; and appeal—how well the ad was liked. The right reach paired with the right resonance will help maximize translating emerging demand into sales.

“By measuring and optimizing advertising campaigns in a consistent manner across platforms, you can adjust key performance levers in real time,” said Gardiner. “Understanding ad resonance provides the insights necessary not only to develop memorable ads but also to impact key purchase funnel measures and brand attributes that drive sales performance.”



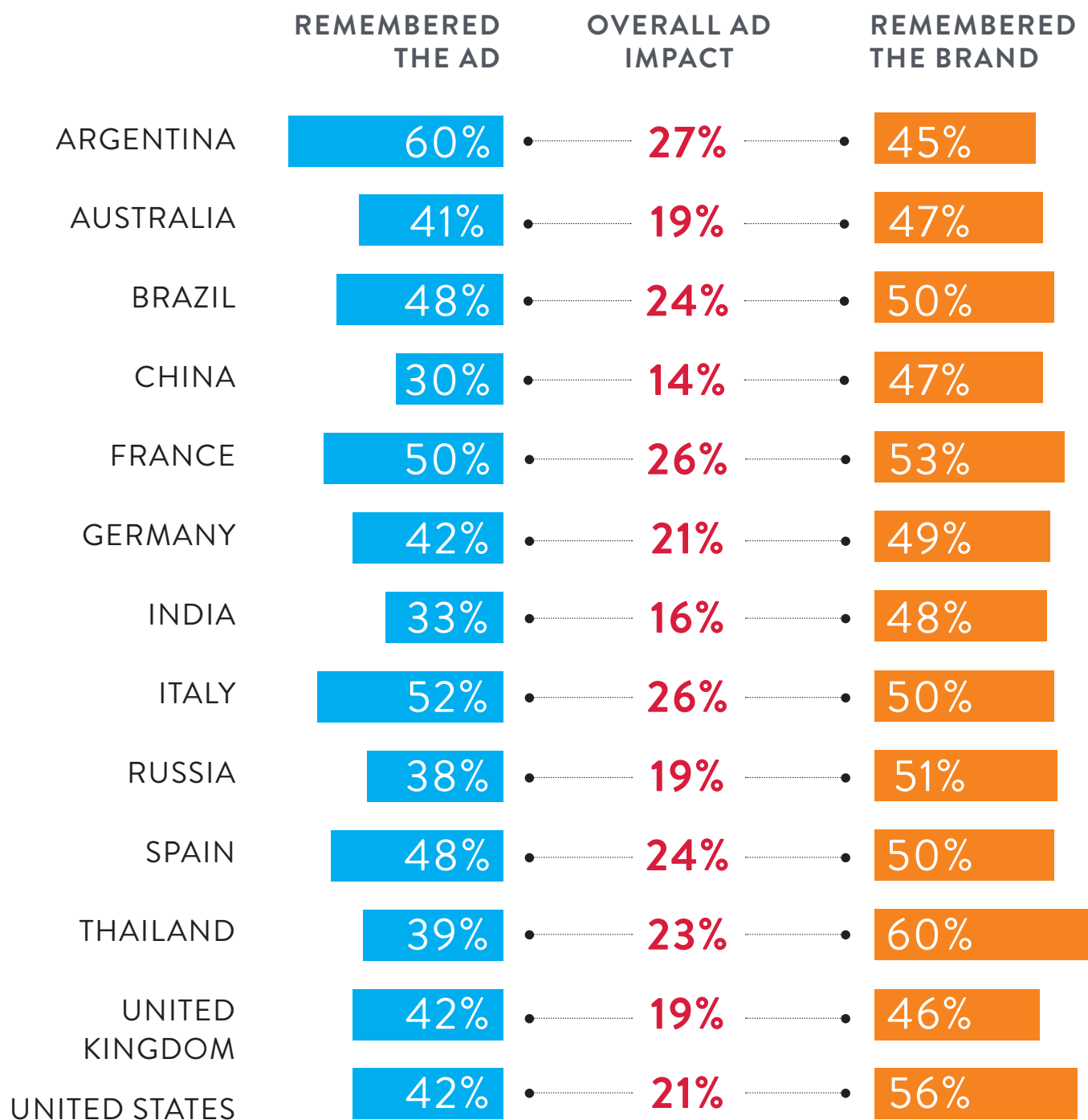
Getting the balance correct is not always easy. For example, the relationship between ad's appeal and breakthrough impact differs by country.

The study shows that in China, automotive ads were extremely likable, registering strong appeal among 90 percent of respondents who saw the ad during normal TV viewing, but the overall breakthrough impact was low at only 14 percent. It turns out that only 30 percent of respondents were able to recall the TV ads, and 47 percent of them could recall the brands. Conversely, in Argentina, on the likability scale, ads appealed to a lower 69 percent of respondents. But more than half (60%) were able to recall the ads, and 45 percent could remember the brands, resulting in an overall ad campaign breakthrough impact of 27 percent—the highest level reported among the 13 countries in the study.

The higher the breakthrough impact score, the better the chances an ad left a memorable impression, which increases the probability that consumers will take action.

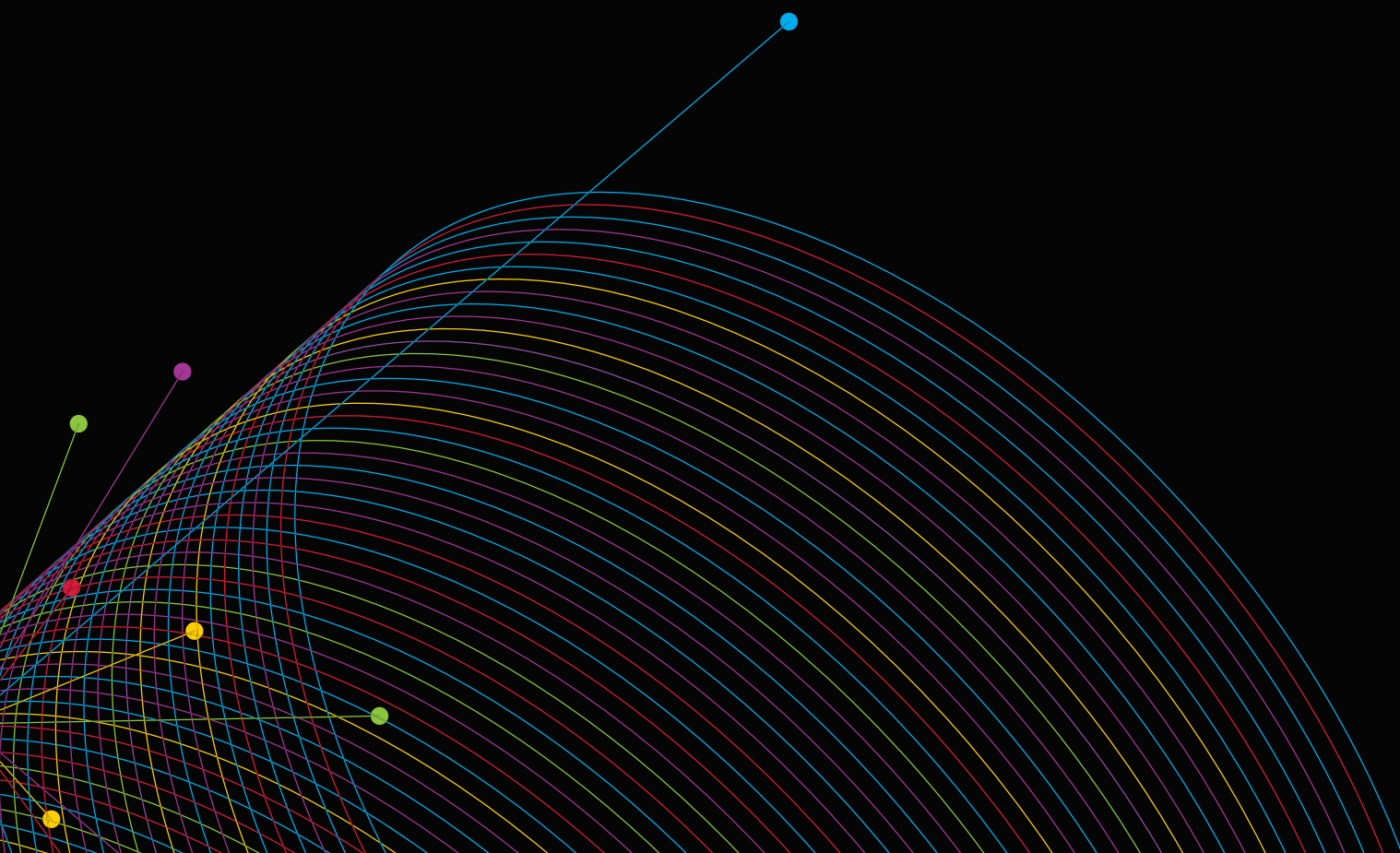
So how do you ensure that your advertising campaign is memorable and achieves strong breakthrough? The answer is: Know your consumers—understand what they watch, what they buy, and how one affects the other.

UNDERSTAND AD RESONANCE TO DEVELOP MORE IMACTFUL ADS



Source: Nielsen Global Brand Effect Study, 2014

PART II:

AUTOMOTIVE
DEMAND
COUNTRY
SCORECARDS



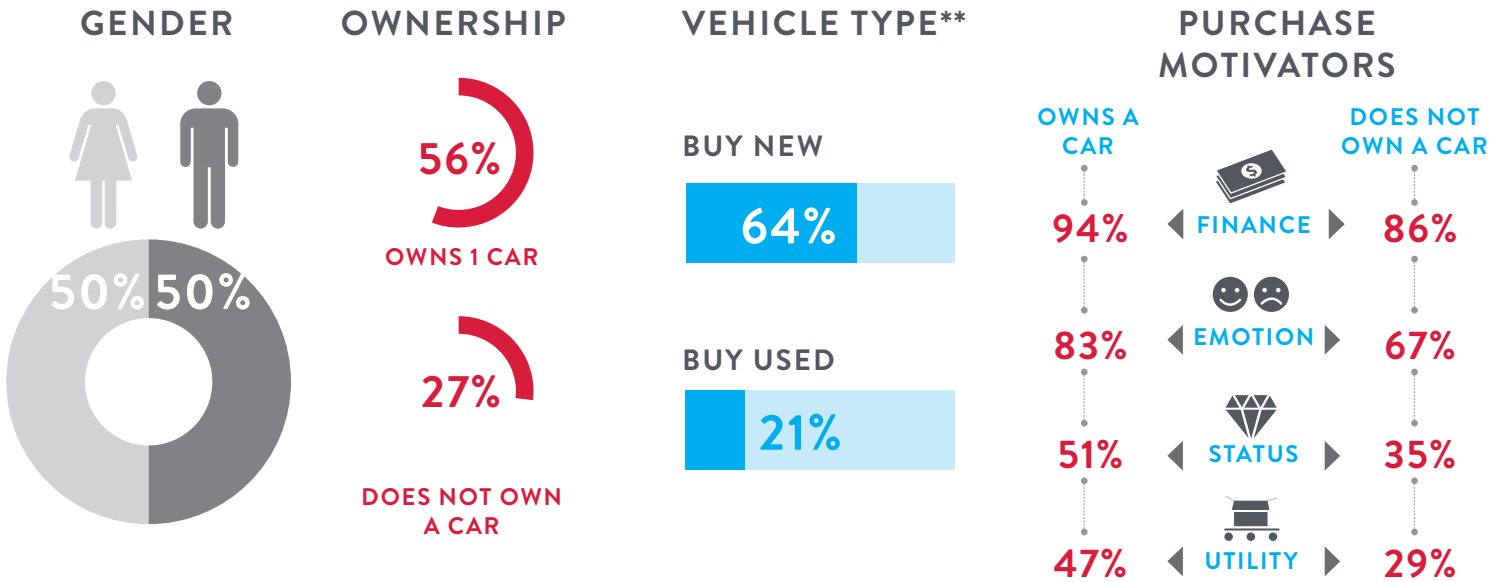
COUNTRIES TO WATCH





BRAZIL CAR BUYER INTENDERS*

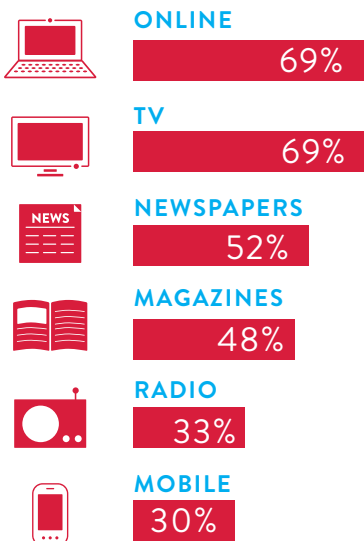
WHO THEY ARE



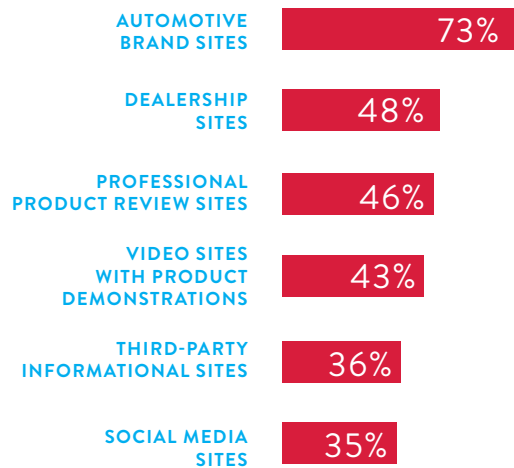
*Intend to buy a new or used car in the next two years
 **Existing car owners

HOW TO REACH THEM

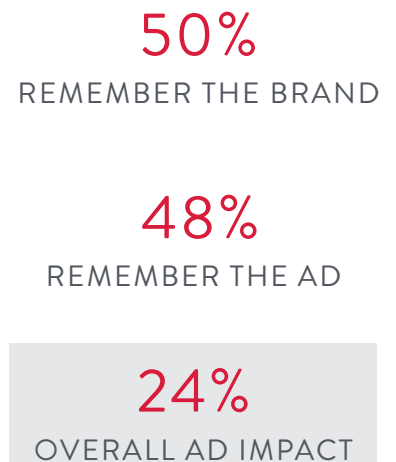
AD PLATFORMS VERY HELPFUL WITH AUTO PURCHASE



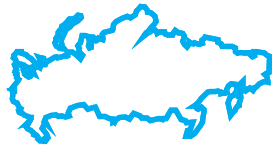
WEBSITES MOST HELPFUL WITH AUTO PURCHASE



AUTO TV AD RECALL



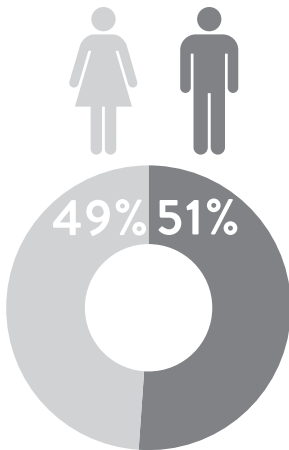
Sources: Nielsen Global Survey of Automotive Demand, Q3 2013 (Who They Are)
 Nielsen Media Consumption Study, 2012 (Ad Platforms/Websites)
 Nielsen Brand Effect Global Study (TV Ad Recall)



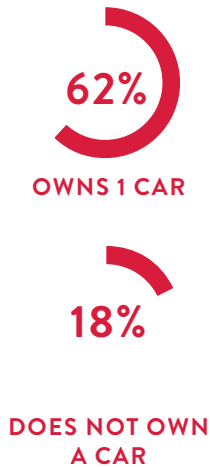
RUSSIA CAR BUYER INTENDERS*

WHO THEY ARE

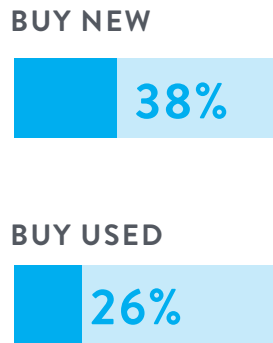
GENDER



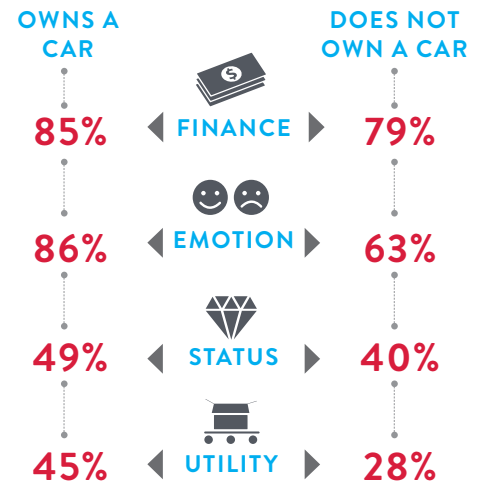
OWNERSHIP



VEHICLE TYPE**



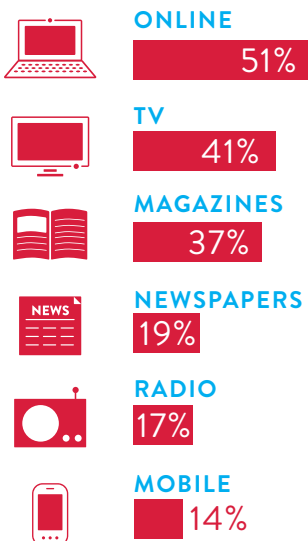
PURCHASE MOTIVATORS



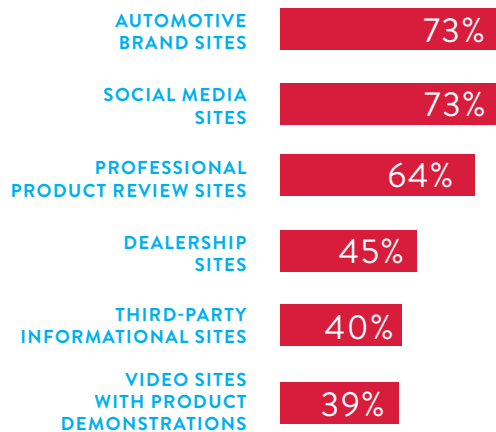
*Intend to buy a new or used car in the next two years
**Existing car owners

HOW TO REACH THEM

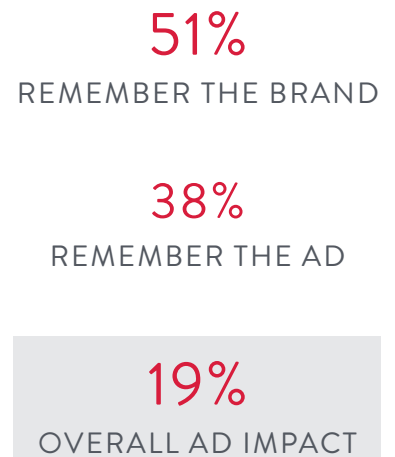
AD PLATFORMS VERY HELPFUL WITH AUTO PURCHASE



WEBSITES MOST HELPFUL WITH AUTO PURCHASE



AUTO TV AD RECALL

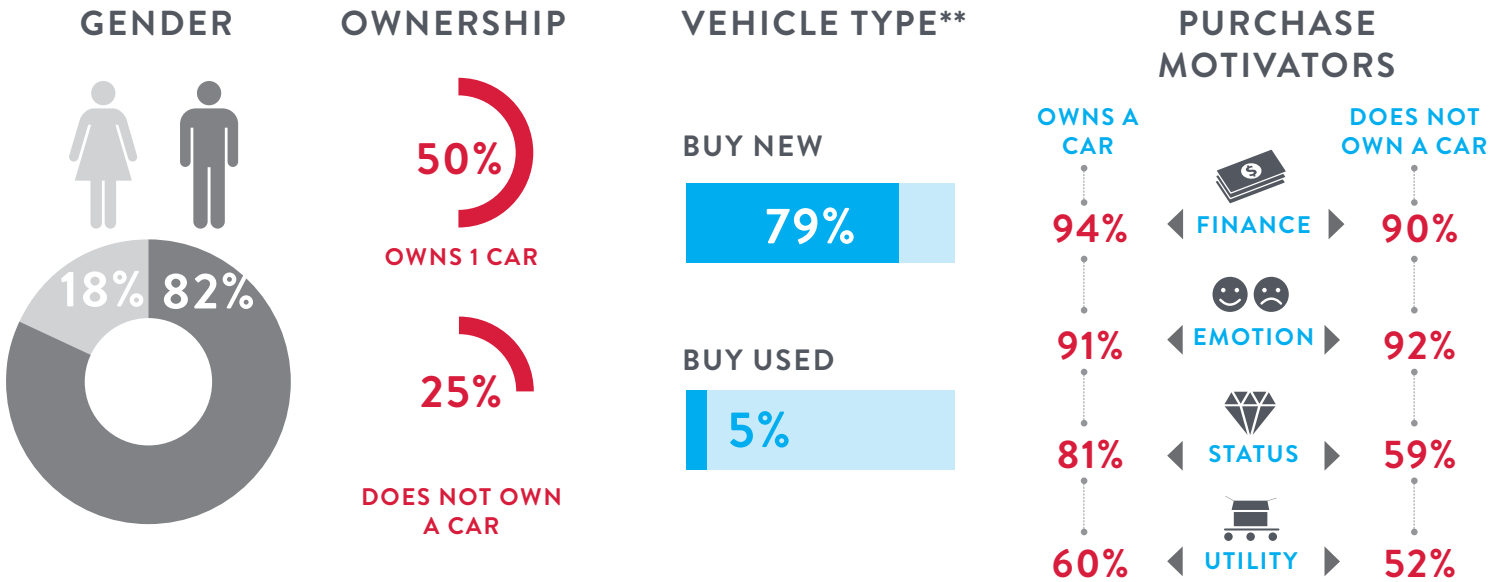


Sources: Nielsen Global Survey of Automotive Demand, Q3 2013 (Who They Are)
Nielsen Media Consumption Study, 2012 (Ad Platforms/Websites)
Nielsen Brand Effect Global Study (TV Ad Recall)



INDIA CAR BUYER INTENDERS*

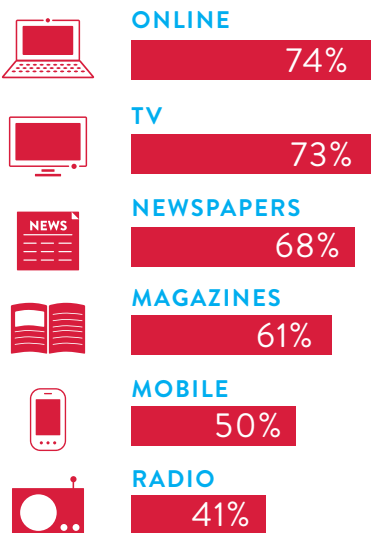
WHO THEY ARE



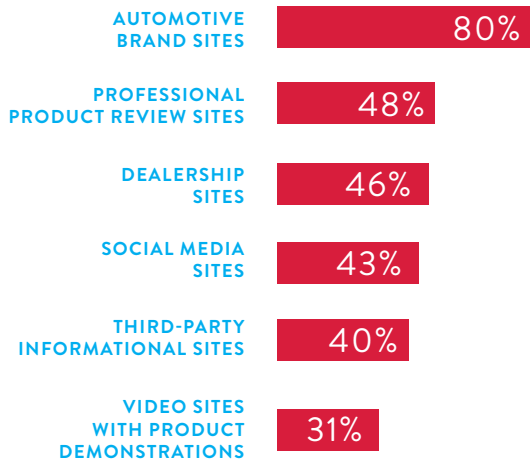
*Intend to buy a new or used car in the next two years
**Existing car owners

HOW TO REACH THEM

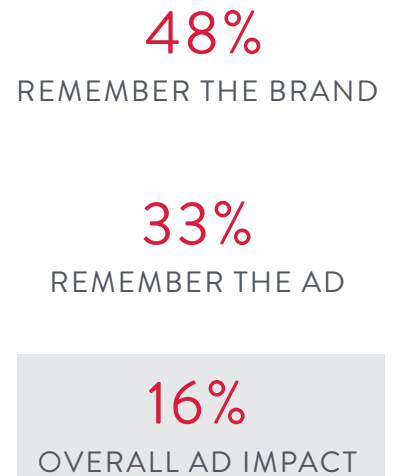
AD PLATFORMS VERY HELPFUL WITH AUTO PURCHASE



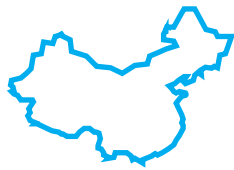
WEBSITES MOST HELPFUL WITH AUTO PURCHASE



AUTO TV AD RECALL



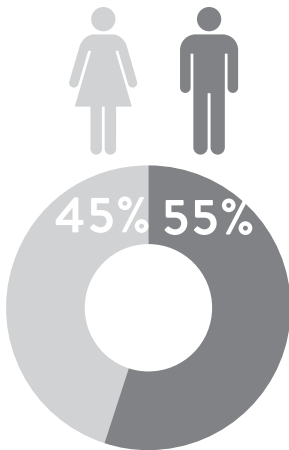
Sources: Nielsen Global Survey of Automotive Demand, Q3 2013 (Who They Are)
Nielsen Media Consumption Study, 2012 (Ad Platforms/Websites)
Nielsen Brand Effect Global Study (TV Ad Recall)



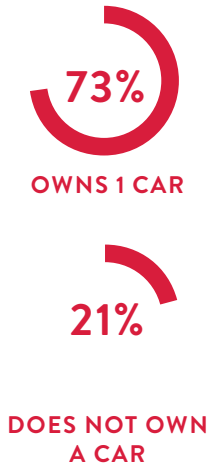
CHINA CAR BUYER INTENDERS*

WHO THEY ARE

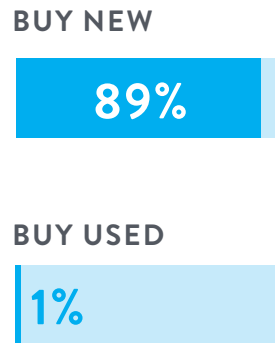
GENDER



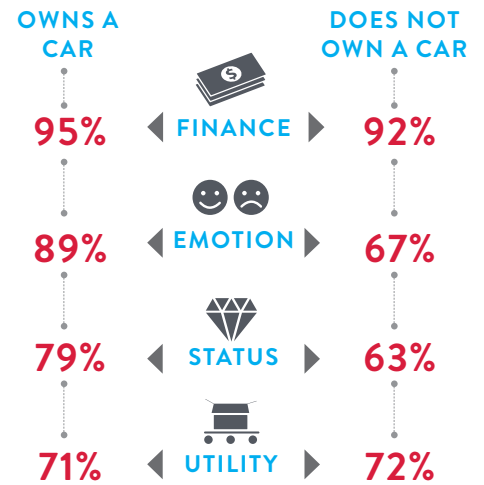
OWNERSHIP



VEHICLE TYPE**



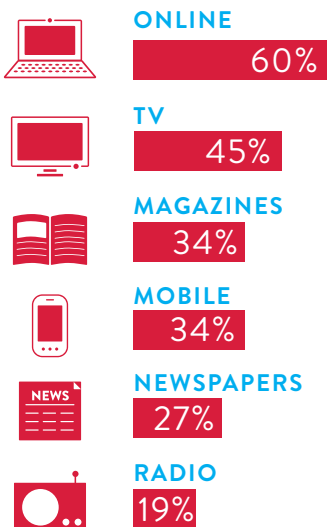
PURCHASE MOTIVATORS



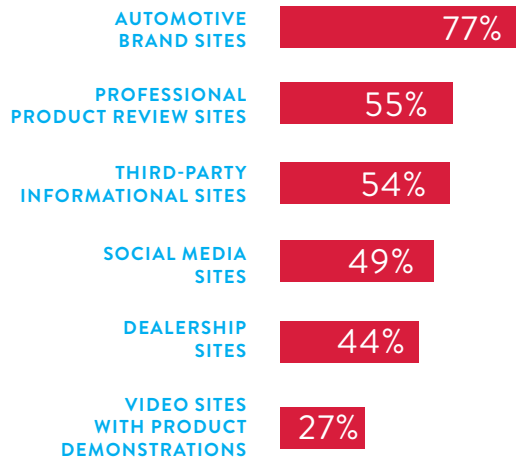
*Intend to buy a new or used car in the next two years
**Existing car owners

HOW TO REACH THEM

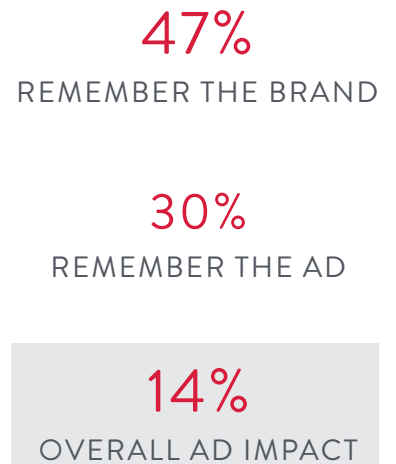
AD PLATFORMS VERY HELPFUL WITH AUTO PURCHASE



WEBSITES MOST HELPFUL WITH AUTO PURCHASE



AUTO TV AD RECALL



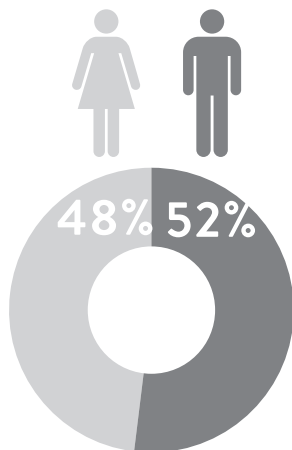
Sources: Nielsen Global Survey of Automotive Demand, Q3 2013 (Who They Are)
Nielsen Media Consumption Study, 2012 (Ad Platforms/Websites)
Nielsen Brand Effect Global Study (TV Ad Recall)



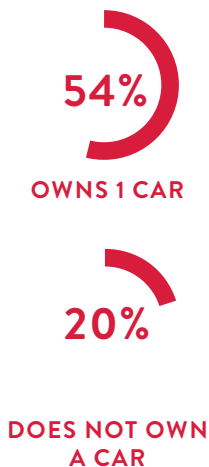
MEXICO CAR BUYER INTENDERS*

WHO THEY ARE

GENDER



OWNERSHIP



VEHICLE TYPE**

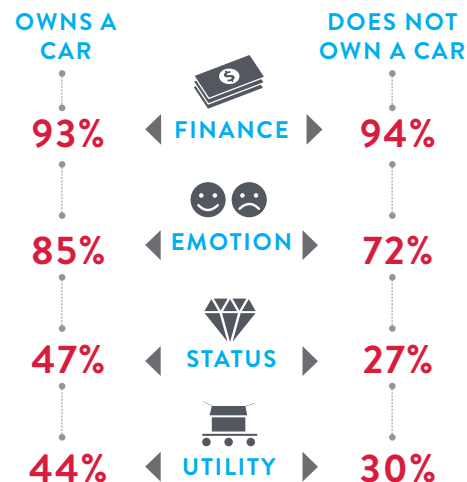
BUY NEW



BUY USED



PURCHASE MOTIVATORS



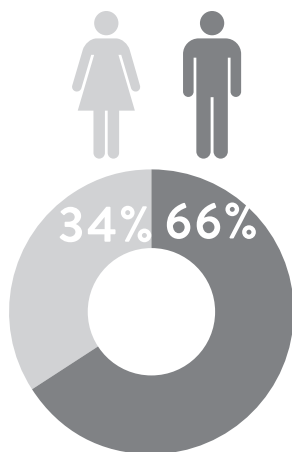
*Intend to buy a new or used car in the next two years
**Existing car owners



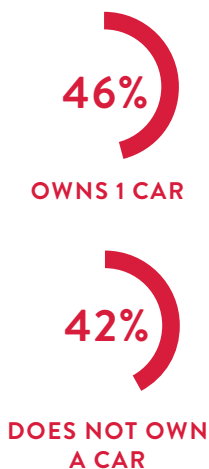
INDONESIA CAR BUYER INTENDERS*

WHO THEY ARE

GENDER

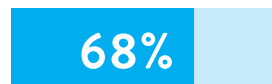


OWNERSHIP



VEHICLE TYPE**

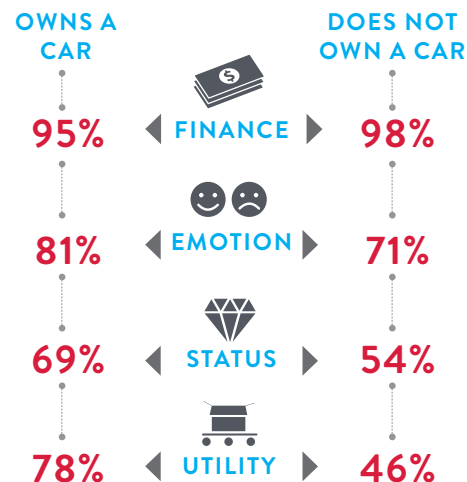
BUY NEW



BUY USED



PURCHASE MOTIVATORS



*Intend to buy a new or used car in the next two years
**Existing car owners

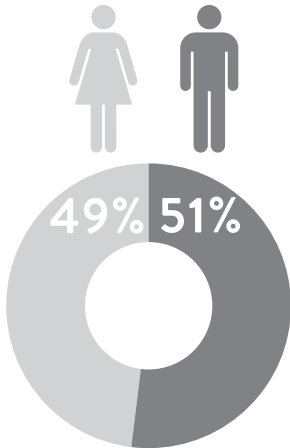
Source: Nielsen Global Survey of Automotive Demand, Q3 2013



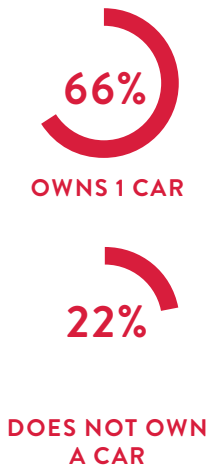
TURKEY CAR BUYER INTENDERS*

WHO THEY ARE

GENDER



OWNERSHIP

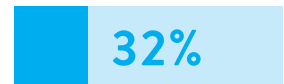


VEHICLE TYPE**

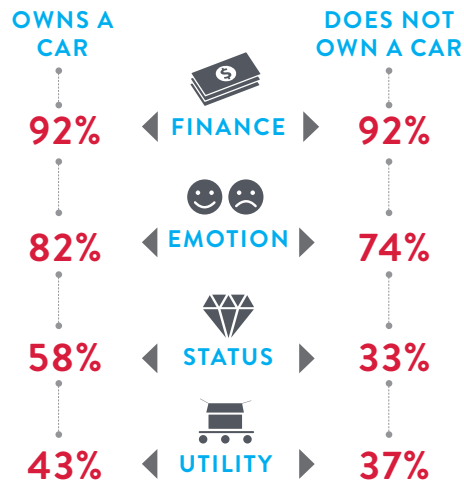
BUY NEW



BUY USED



PURCHASE MOTIVATORS



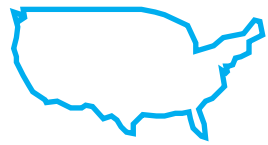
*Intend to buy a new or used car in the next two years

**Existing car owners

Source: Nielsen Global Survey of Automotive Demand, Q3 2013

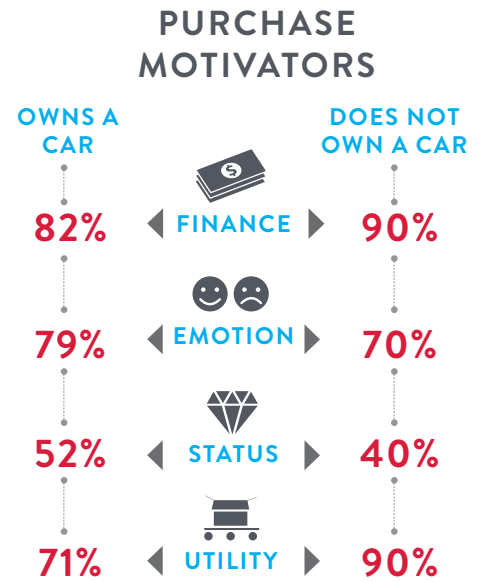
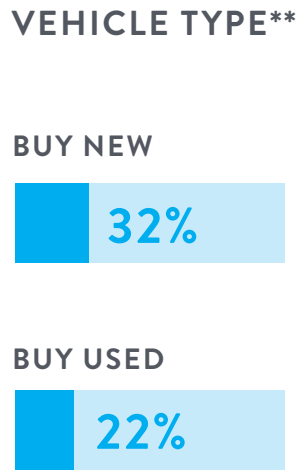
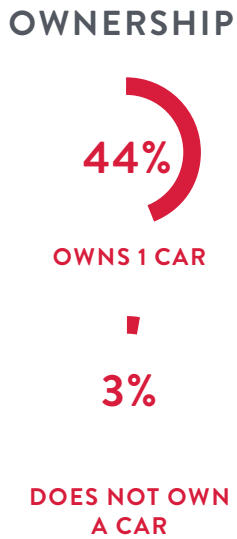
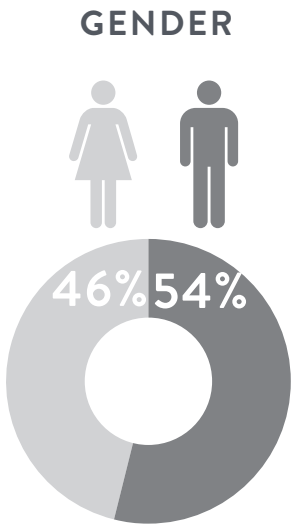


ESTABLISHED AUTO MARKETS



US CAR BUYER INTENDERS*

WHO THEY ARE



*Intend to buy a car in the next 2 years
**Existing car owners

HOW TO REACH THEM

AUTO TV AD RECALL

51%

REMEMBER THE BRAND

42%

REMEMBER THE AD

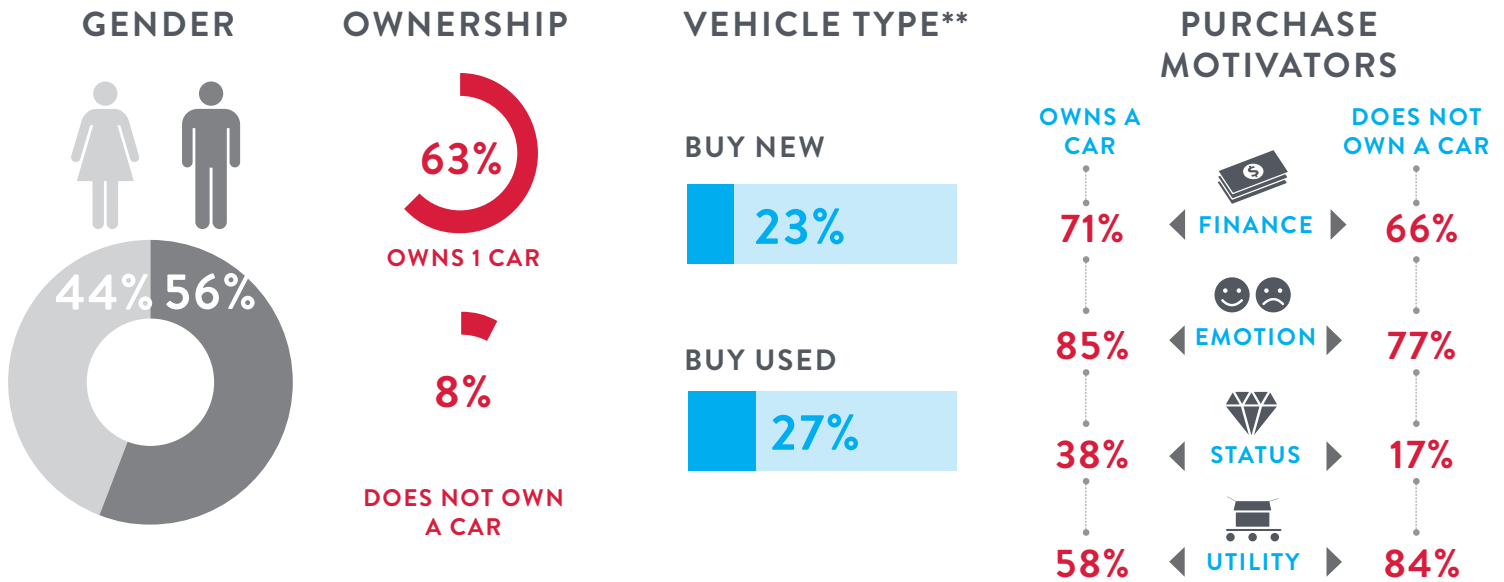
21%

OVERALL AD IMPACT

Sources: Nielsen Global Survey of Automotive Demand, Q3 2013 (Who They Are)
Nielsen Brand Effect Global Study (TV Ad Recall)

GERMANY CAR BUYER INTENDERS*

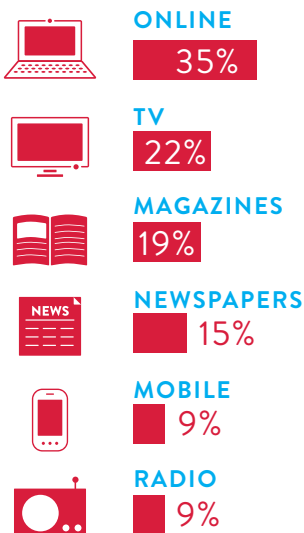
WHO THEY ARE



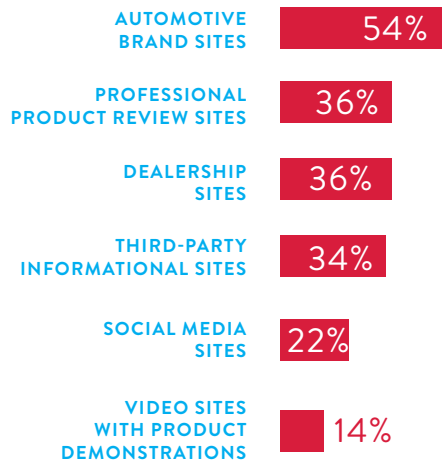
*Intend to buy a new or used car in the next two years
**Existing car owners

HOW TO REACH THEM

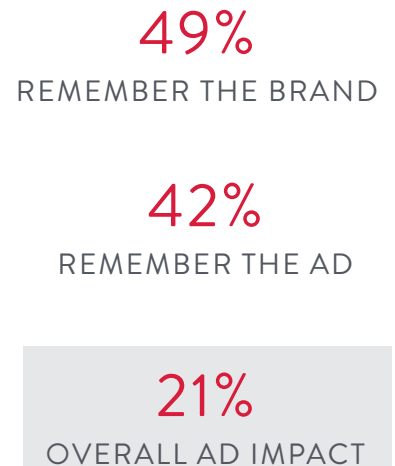
AD PLATFORMS VERY HELPFUL WITH AUTO PURCHASE



WEBSITES MOST HELPFUL WITH AUTO PURCHASE



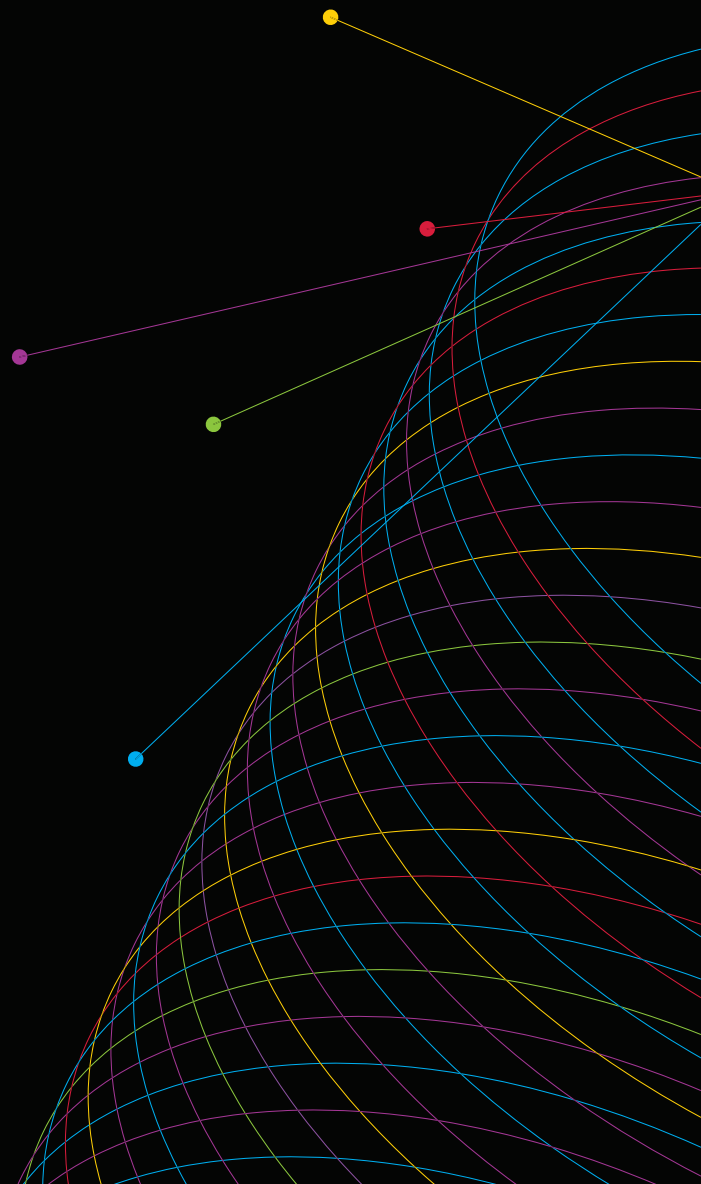
AUTO TV AD RECALL



Sources: Nielsen Global Survey of Automotive Demand, Q3 2013 (Who They Are)
Nielsen Media Consumption Study, 2012 (Ad Platforms/Websites)
Nielsen Brand Effect Global Study (TV Ad Recall)

PART III:

VEHICLE OWNERSHIP AROUND THE WORLD AND EMERGING TRENDS



NO CAR?

AUTO ALTERNATIVES AND CONSUMERS GO HAND IN HANDLEBAR

How do we get around town when we aren't using a car, or don't own one? We often hop on some type of two-wheeled vehicle. Aside from cars, the most commonly owned vehicles around the world are more traditional, with half of global respondents (49%) owning at least one bicycle and 22 percent owning at least one motorcycle. And those looking for a middle ground between manpower and horsepower opt for an electric bicycle (15%) or scooter (11%) as their vehicle of choice.

Bicycles have come a long way since the first one was invented in the 1870s, and their reach has expanded around the globe. Given their relatively low cost, the little maintenance they require, ease of use and environmentally friendly benefits, there is good reason why more than half of respondents in Europe (57%), Latin America (55%) and Asia-Pacific (51%) own at least one bicycle. Bicycle ownership is highest in Denmark (89%), the Czech Republic (82%), Finland (82%) and the Netherlands (81%), with some respondents indicating that they own as many as nine bicycles per household. Meanwhile, ownership is lowest in North America (33%) and the Middle East/Africa (27%).

In countries where road infrastructure and rugged terrain require more horsepower and where crowded city streets require maneuverability, motorcycles are the two-wheeled vehicle of choice. Ownership is greatest in Asia-Pacific (33%), Middle East/Africa (30%) and Latin America (19%), double and sometimes more than double ownership levels in North America (9%) and Europe (9%). Motorcycle ownership is highest in Indonesia (91%), Thailand (72%), India (71%) and Pakistan (64%).

Those looking for the convenience of motorized transportation, but not requiring the speed of motorcycles, opt for scooters. Ownership is highest in Asia-Pacific (18%) and the Middle East/Africa (12%) and lowest in Latin America (4%), North America (5%) and Europe (7%). In Vietnam (90%), Taiwan (52%) and India (43%), the top three countries for scooter ownership, navigating densely crowded streets with these vehicles is most efficient.



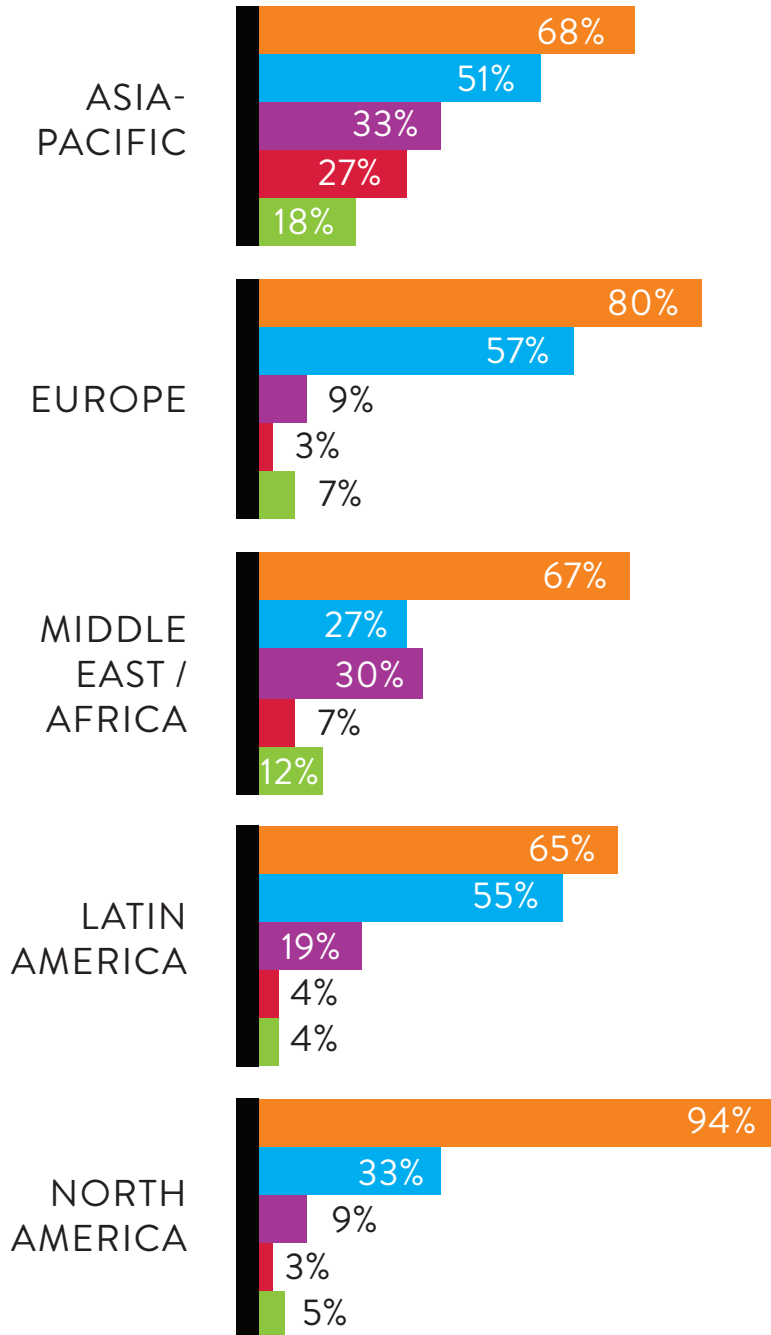
One vehicle growing in popularity is the electric bicycle. Utilizing a small electric motor to assist propulsion, these bicycles still offer the functionality of pedaling if the rider prefers, which is what differentiates them from fully motorized scooters. Their popularity has grown in recent years, as they offer an inexpensive option for convenient travel on gridlocked streets.

Electric bicycle ownership is greatest in Asia-Pacific, where 27 percent of respondents own at least one. Electric bicycles are most popular in China, where ownership is 45 percent, followed by Vietnam (27%). The trend has not yet gained the same traction in the Middle East/Africa (7%), Latin America (4%), North America (3%) and Europe (3%), where ownership is still nascent.

HOW WE GET AROUND

PERCENT WHO OWN, RENT OR LEASE AT LEAST ONE VEHICLE BY REGION

● CAR
 ● BICYCLE
 ● MOTORCYCLE
 ● ELECTRIC BICYCLE
 ● SCOOTER



Source: Nielsen Global Survey of Automotive Demand, Q3 2013

HIGHEST COUNTRY OWNERSHIP

CAR

96%
U.S.

BICYCLE

89%
DENMARK

MOTORCYCLE

91%
INDONESIA

ELECTRIC BICYCLE

45%
CHINA

SCOOTER

90%
VIETNAM

COUNTRIES INCLUDED IN THIS STUDY

ASIA-PACIFIC

MARKET	INTERNET PENETRATION
Australia	89%
China	40%
Hong Kong	75%
India	11%
Indonesia	22%
Japan	80%
Malaysia	61%
New Zealand	88%
Philippines	32%
Singapore	75%
South Korea	83%
Taiwan	75%
Thailand	30%
Vietnam	34%

EUROPE

MARKET	INTERNET PENETRATION
Austria	80%
Belgium	81%
Bulgaria	51%
Croatia	71%
Czech Republic	73%
Denmark	90%
Estonia	78%
Finland	89%
France	80%
Germany	83%
Greece	53%
Hungary	65%
Ireland	77%
Israel	70%
Italy	58%
Latvia	72%
Lithuania	65%
Netherlands	93%
Norway	97%
Poland	65%

EUROPE

MARKET	INTERNET PENETRATION
Portugal	55%
Romania	44%
Russia	48%
Serbia	56%
Slovakia	79%
Slovenia	72%
Spain	67%
Sweden	93%
Switzerland	82%
Turkey	46%
United Kingdom	84%
Ukraine	34%

LATIN AMERICA

MARKET	INTERNET PENETRATION
Argentina	66%
Brazil	46%
Chile	59%
Colombia	60%
Mexico	37%
Peru	37%
Venezuela	41%

MIDDLE EAST / AFRICA

MARKET	INTERNET PENETRATION
Egypt	36%
Pakistan	15%
Saudi Arabia	49%
South Africa	17%
United Arab Emirates	71%

NORTH AMERICA

MARKET	INTERNET PENETRATION
Canada	83%
United States	78%

Source: Internet World Stats, June 30, 2012

ABOUT THE NIELSEN GLOBAL SURVEY

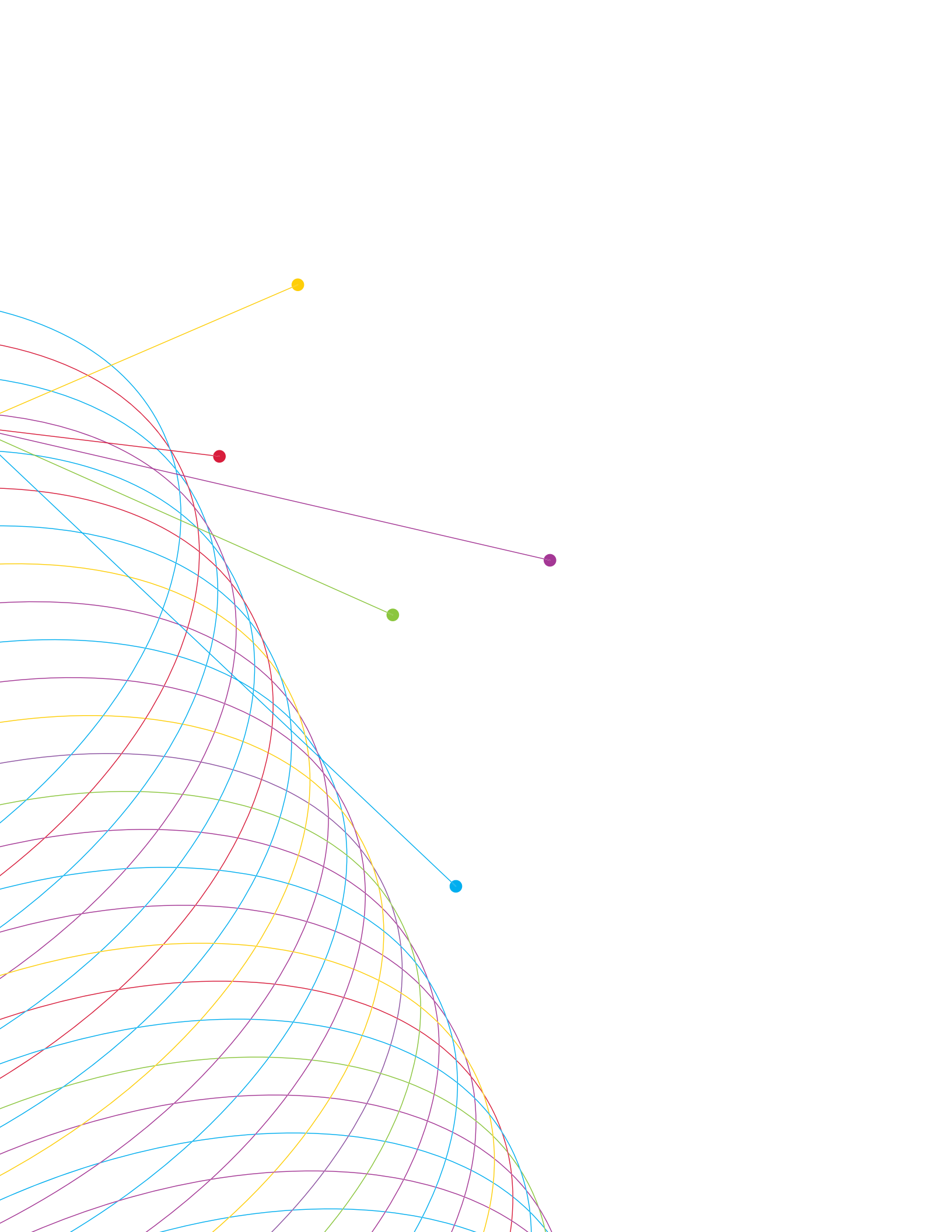
The Nielsen Global Survey of Automotive Demand was conducted between Aug. 14 and Sept. 6, 2013, and polled more than 30,000 consumers in 60 countries throughout Asia-Pacific, Europe, Latin America, the Middle East, Africa and North America. The sample has quotas based on age and sex for each country based on its Internet users, and is weighted to be representative of Internet consumers. It has a maximum margin of error of ± 0.6 percent. 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 Survey, was established in 2005.

ABOUT THE 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 THE GLOBAL BRAND EFFECT STUDY

The Nielsen Global Brand Effect Study has been tracking automotive brands in syndication since 2014 and has analyzed hundreds of automotive television ads among millions of consumers in 15 countries. The countries in this report include: Argentina, Australia, Brazil, China, France, Germany, India, Italy, Russia, Spain, Thailand, the United Kingdom and the United States. Tracking for Mexico and Taiwan was not available at the time of this publication.

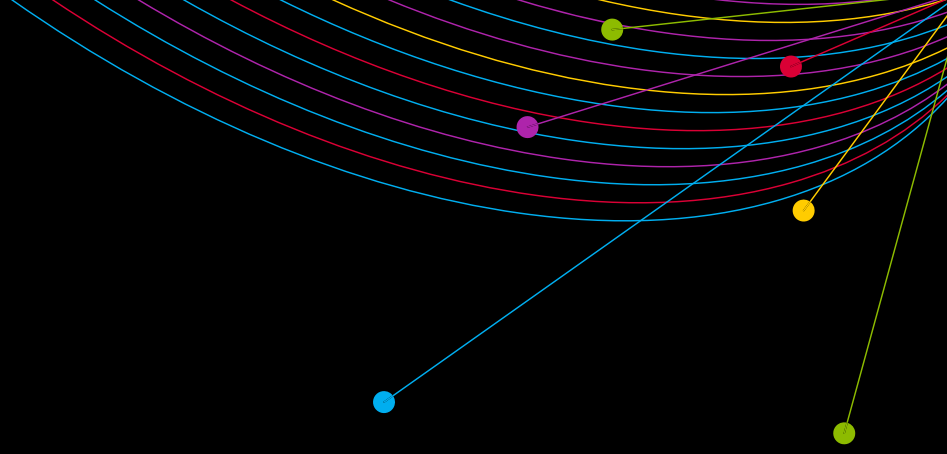


ABOUT NIELSEN

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](http://www.nielsen.com).

Copyright © 2014 The Nielsen Company. All rights reserved. Nielsen and the Nielsen logo are trademarks or registered trademarks of CZT/ACN Trademarks, L.L.C. Other product and service names are trademarks or registered trademarks of their respective companies. 14/7598



nielsen
.....

AN UNCOMMON SENSE
OF THE CONSUMER™