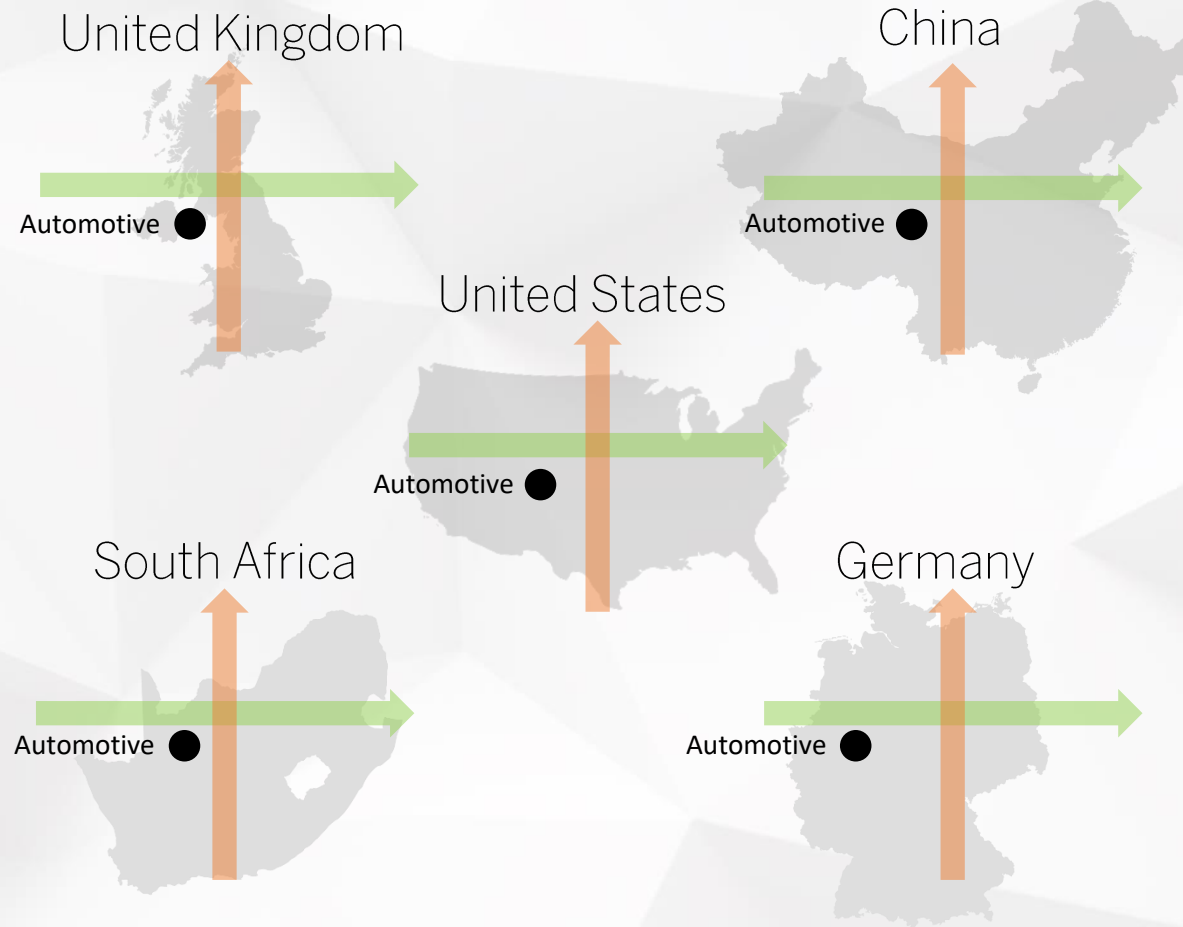




# BRANDS IN ***MOTION***

AUTOMOTIVE CATEGORY

# AUTOMOTIVE **CATEGORY**



## AUTOMOTIVE:

Category defined as: Including cars, trucks, motorcycles, or other motorized mode of transportation as well as the technologies and in-dash services within the vehicle

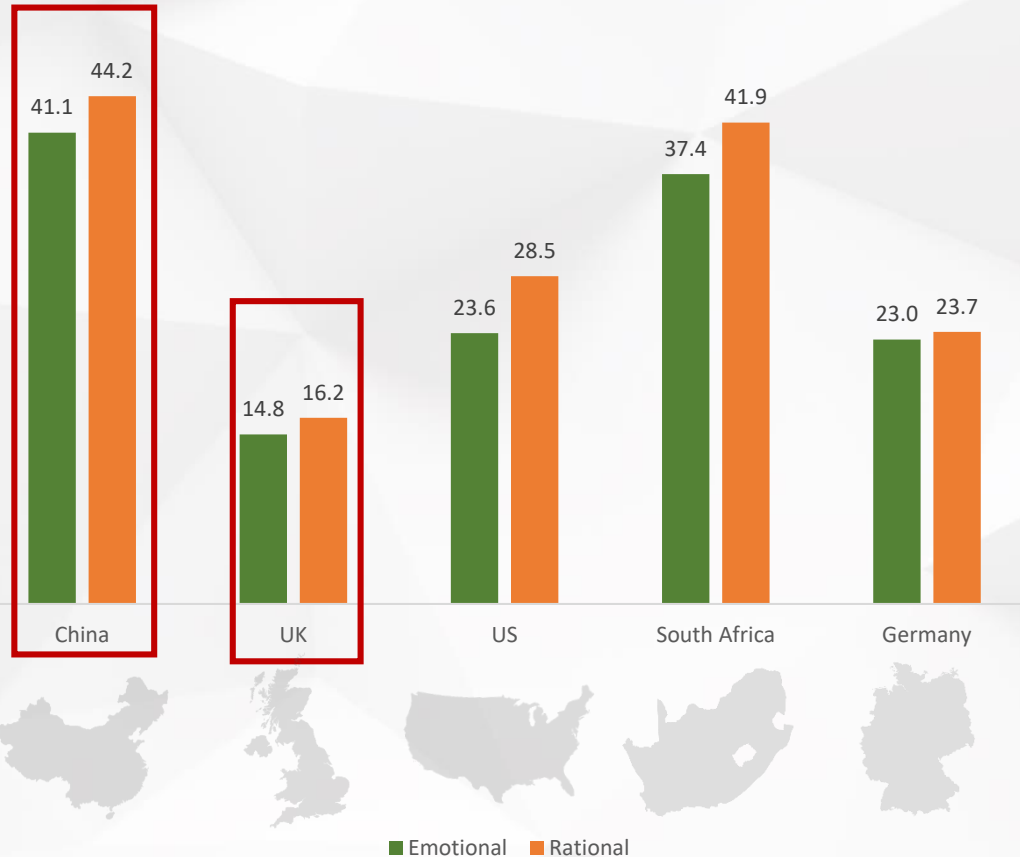
The category was surveyed in 5 of the 6 markets and in each market the category is seen as a survivor based on the average emotional and rational responses of those surveyed.

A total of 3,861 people answered questions specific to the Automotive category across the five markets markets.

(US:758, UK:749, China:526, Germany:764, & South Africa:1064)



# GLOBAL VIEW: **AUTOMOTIVE**



## OBSERVATIONS

- China had the highest average emotional and rational response rate when comparing it to the category responses of the other four markets surveyed.
- UK respondents gave the category the lowest average emotional and rational response rate vs. the other markets surveyed.

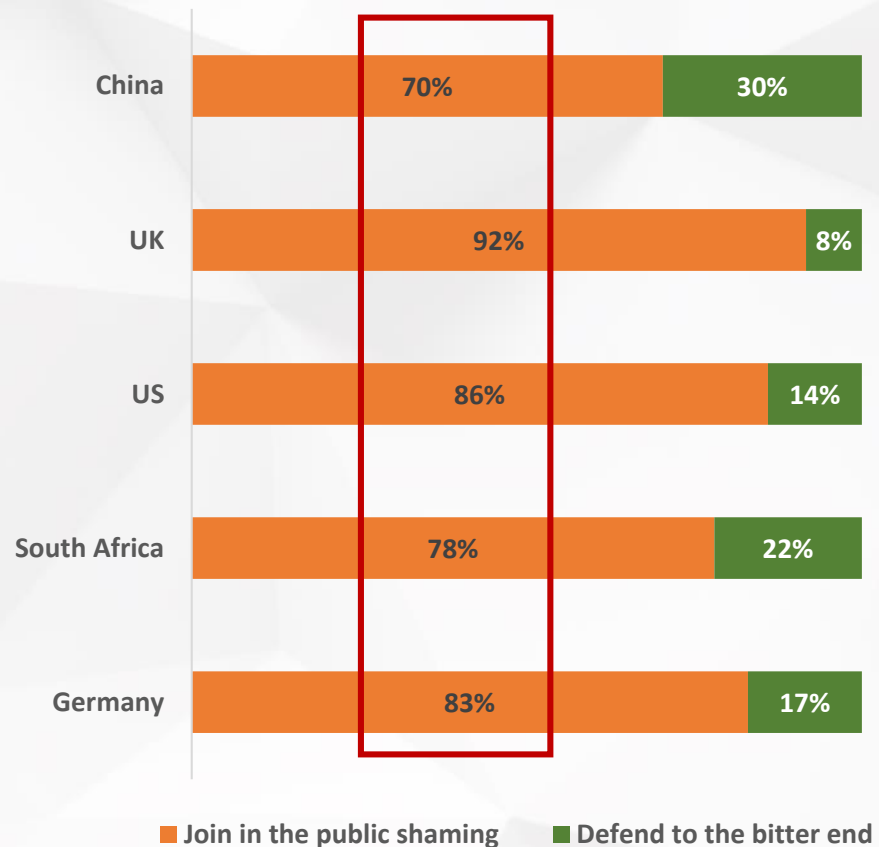




# BRANDS IN ***MOTION***

Emotional Drivers

# GLOBAL VIEW: **EMOTIONAL DRIVER**



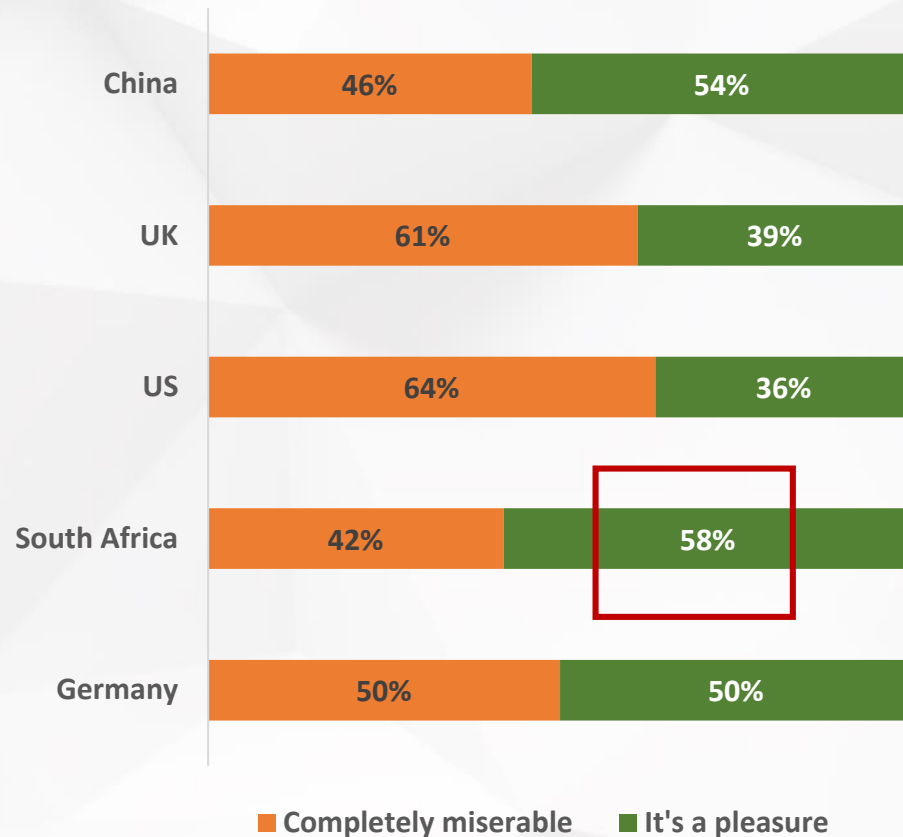
## DEFEND OR SHAME

Suppose a Automotive company was publicly under attack for a product or service issue, would you?

- Over 70% of respondents in all markets said they would “Join in the public shaming” of an Automotive company was publicly under attack for a product or service issue.



# GLOBAL VIEW: **EMOTIONAL DRIVER**



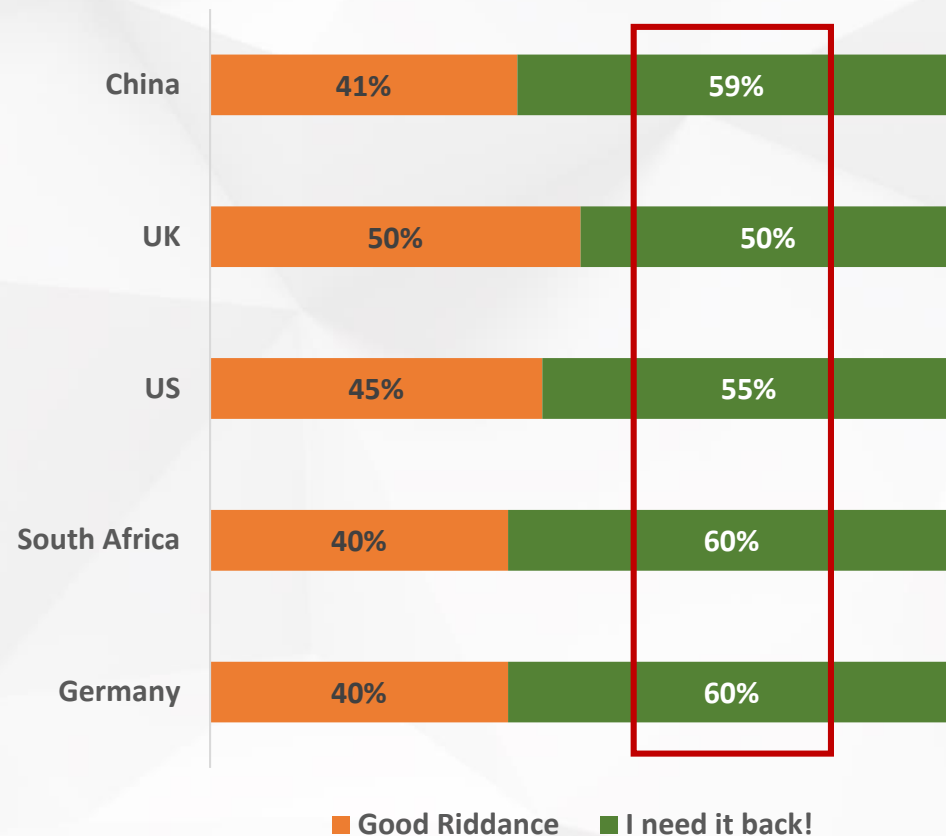
## EXPERIENCE

When interacting with Automotive companies, generally how is the experience?

- 58% of respondents in South Africa expressed "It's a pleasure when asked generally about the experience when interacting with Automotive Companies."
- More than 6 out of 10 respondents in the US and UK said that the experience is "Completely miserable"



# GLOBAL VIEW: **EMOTIONAL DRIVER**



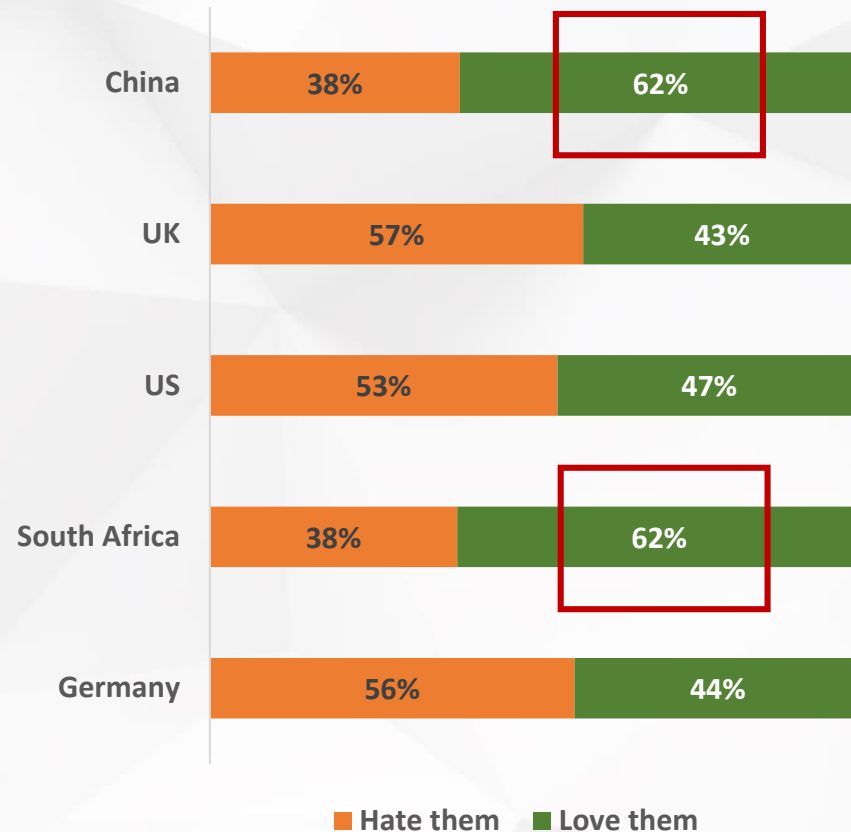
## DISAPPEARED

If the Automotive were to one day just disappear, how would you feel?

Over half of the respondents in all markets said "I need it back!" when asked how they would feel if the category was to just one day disappear.



# GLOBAL VIEW: **EMOTIONAL DRIVER**



## LOVE/HATE

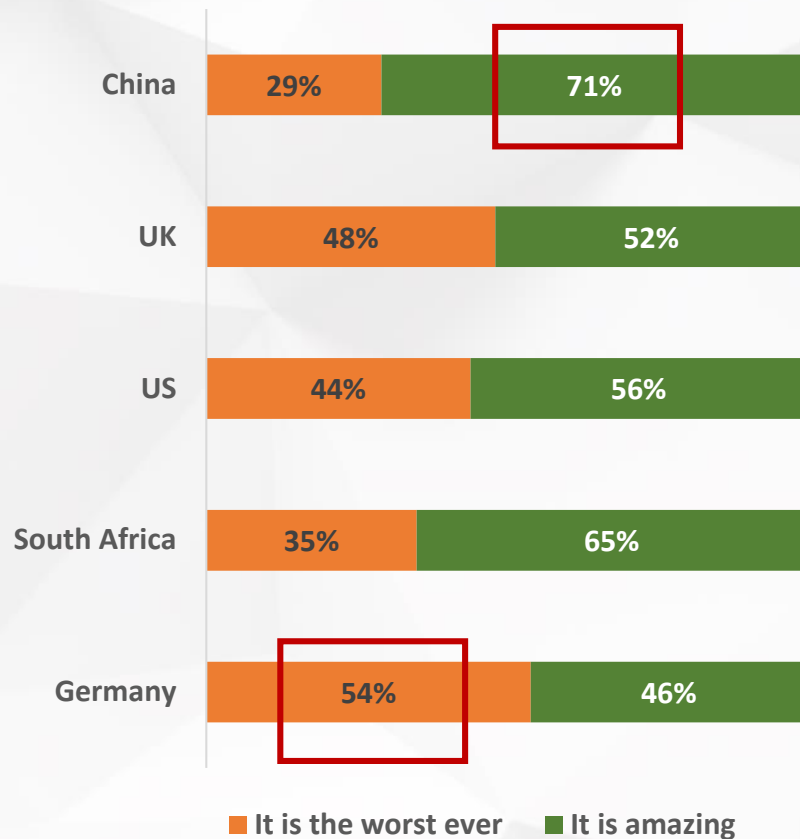
When thinking about Automotive do you generally...?

- More than 60% of respondents in the emerging markets of China and South Africa showed love for the category, when over half of the respondents in the more established markets of the US, UK, and Germany showed hate.





# GLOBAL VIEW: **EMOTIONAL DRIVER**



## OVERALL IMPRESSION

What is your overall impression of Automotive companies?

- At 54%, respondents in Germany had the worst impression of companies in the Auto category.
- Chinese respondents displayed the highest impression for the category with 71% of respondents saying "It is amazing".

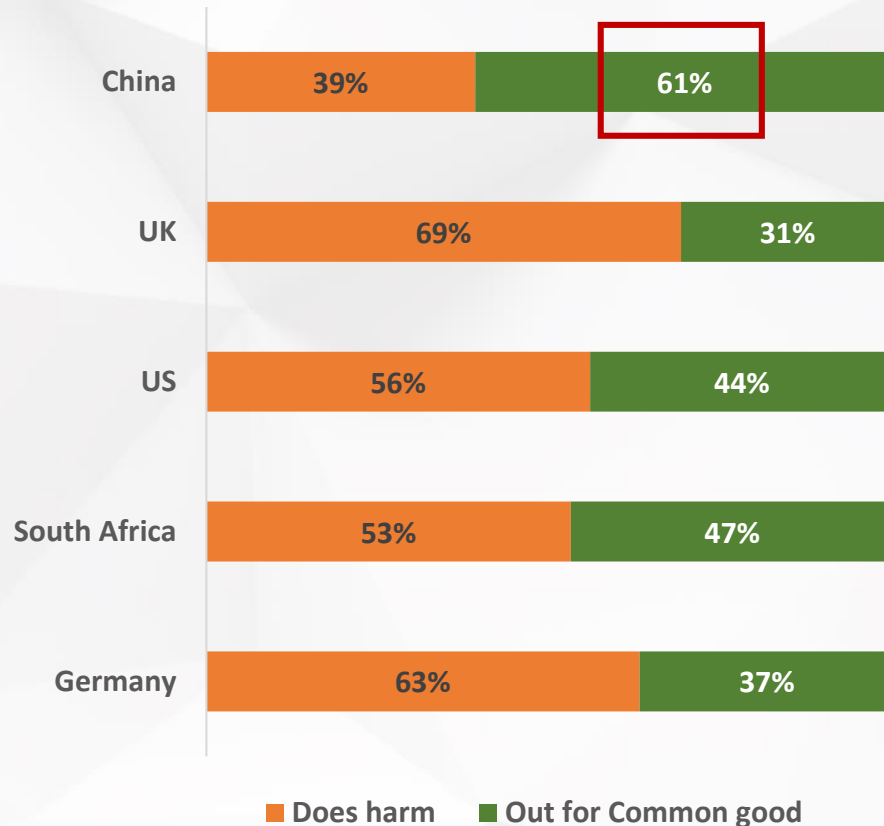


# GLOBAL VIEW: **EMOTIONAL DRIVER**

## SOCIAL IMPACT

When thinking about Automotive companies, what is their overall impact on society?

- China was the only market to have a larger % of respondents believe that Auto companies are “Out for the Common Good” when asked about the categories overall impact on society.





# BRANDS IN ***MOTION***

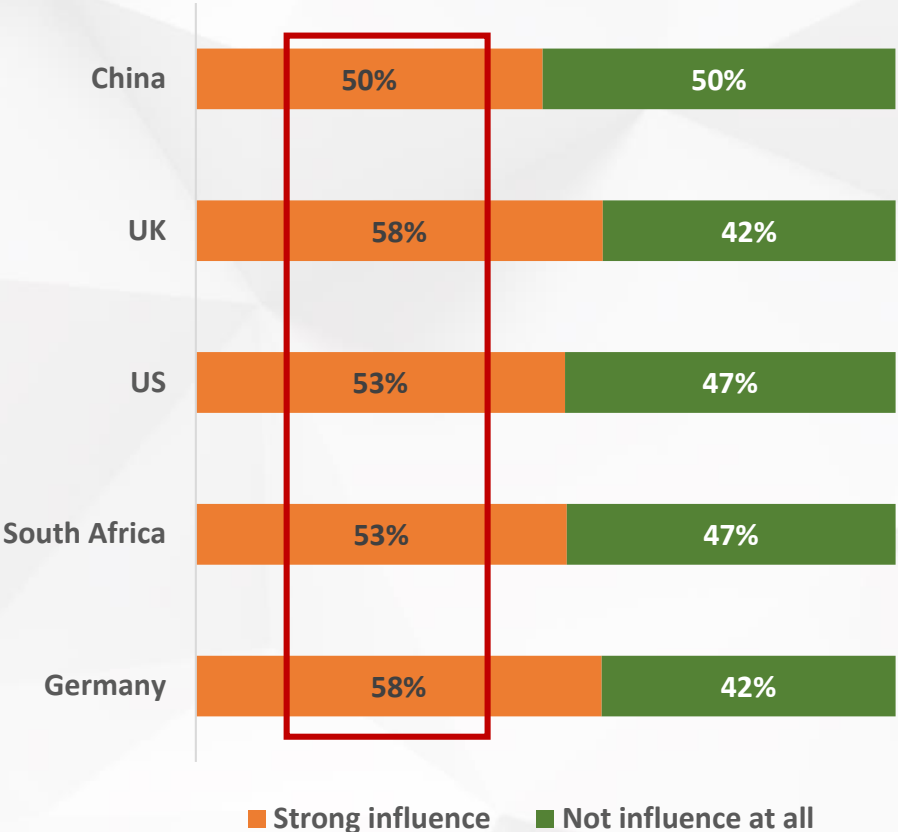
Rational Drivers

# GLOBAL VIEW: **RATIONAL DRIVER**

## EXECUTIVE BEHAVIOUR

Would the behaviours of the executive leaders of a company in the Automotive industry influence your decision to support the brand or not?

- At least 50% of respondents in all markets believe that the executive behavior influences their decision to support a brand.



Percentages represent the percent of respondents who responded above or below the average emotional score by market.

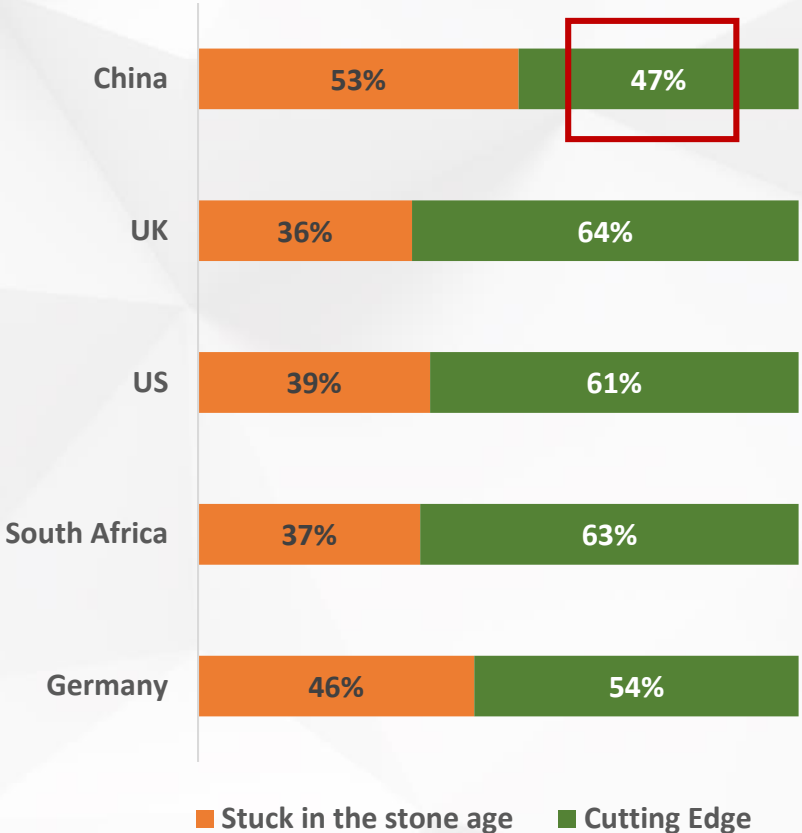


# GLOBAL VIEW: **RATIONAL DRIVER**

## INNOVATION

How innovative are Automotive companies?

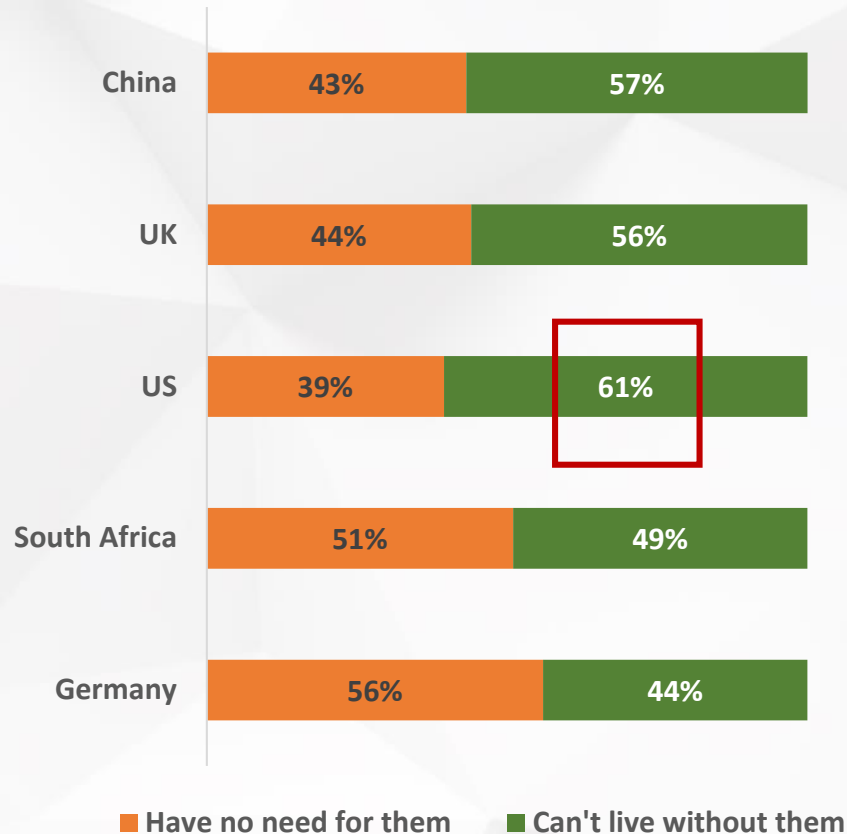
- At 47%, China was the only market to have less than half of the respondents in the market believe that Automotive companies are “Cutting Edge”.



Percentages represent the percent of respondents who responded above or below the average emotional score by market.



# GLOBAL VIEW: **RATIONAL DRIVER**



## NECESSARY

How necessary are Automotive companies to your life?

- US respondents showed the most reliance on the category with 61% saying "Can't live without them" when asked how necessary Automotive companies are to their lives.

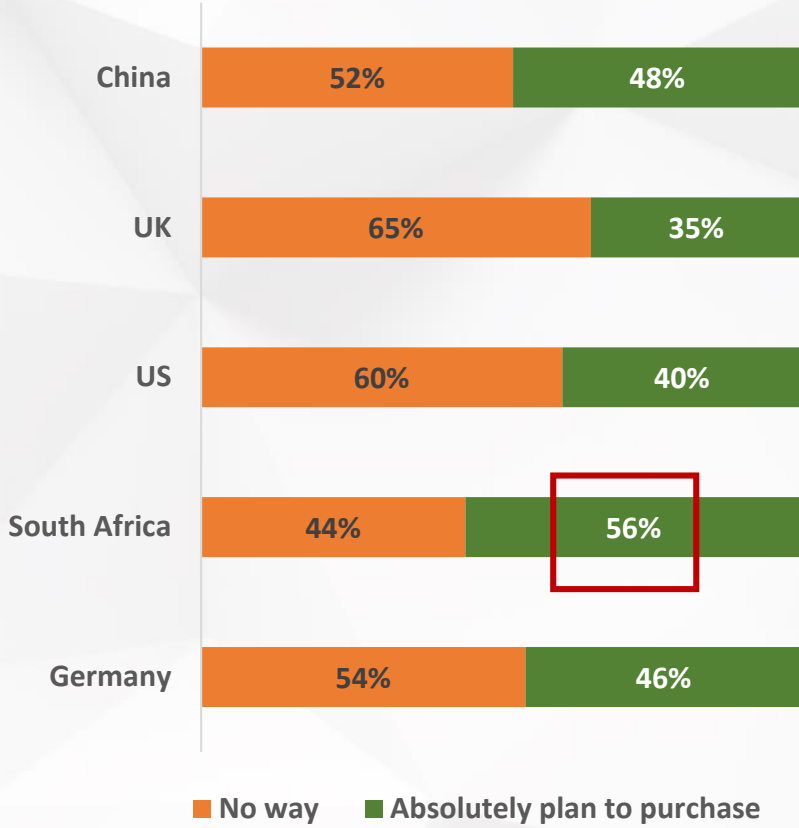


# GLOBAL VIEW: **RATIONAL DRIVER**

## INTENT TO PURCHASE

How likely are you to purchase products or services from Automotive companies in the next year?

- Respondents in the South Africa showed the highest intent to purchase, with 56% saying “Absolutely plan to purchase” in the next year.



Percentages represent the percent of respondents who responded above or below the average emotional score by market.

