



MILLENNIALS ARE CLOSING THE GENDER GAP IN CAR SHOPPING

EDMUNDS THOUGHT LEADERSHIP

10 16

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KEY FINDINGS

MILLENNIALS:
CLOSING THE GAP

MARKET TO WHOLE
PERSON

BENEFITS OF
PERSONALIZATION

APPENDIX

Millennials are closing the gender gap in car shopping

Men and women aren't really different when it comes to car shopping.

Data from a survey among 3,000 car shoppers reveals it's important to both men and women that they feel prepared when they're shopping for a car. Most of them research everything so they don't miss anything – resulting in confidence when they're shopping at the dealership.

Sweeping generalizations will miss the mark.

Overall, most women want a streamlined shopping process – but not everyone wants to do the same activity or is at the same point in their journey. It is important to consider each shopper as an individual and understand their specific needs.

Millennial men and women are most alike.

Young women are just as confident and empowered car shoppers as young men. Though older generations believe men still have the upper hand in negotiations, Millennial men credit their female counterparts with negotiation skills as good or better than their own.

Personalization is critical to all shoppers.

Men and women are both looking for a better car shopping experience, but personalization is crucial to addressing their differences. A better experience means less pressure, transparent pricing, and efficiency, and the good news is that both men and women are open to personalized experiences.

Men and women are still different in nuanced ways.

While the majority of men and women feel similarly, there are still differences. Women want to use their time differently from men – they want to shop efficiently, but the process feels overwhelming and exhausting to some. More men savor every bit of the journey and trust their intuition.



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MILLENNIALS

ARE CLOSING THE GENDER GAP IN CAR SHOPPING

Men and women are more similar than you might think when it comes to car shopping



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Both men and women
strongly embrace the
research stage of the
process

The majority of both men
and women feel that
preparation is key to a
successful purchase

Based to total: % Feel much more/somewhat more like this
Q9. How do you feel when you are deciding what car to buy?
Arrows indicate significant differences at a 95% level of confidence.

I like to **research
everything**, so I
don't miss anything



"Coming in prepared is key.
Be ready to ask all the
questions, to get as much
information as you need to
get the product that you
want, have an open mind."

Millennial Female

"I'm a seeker. And I love to
do research. I'm structured,
strategic about it. "

Gen X Male



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Edmunds' site
behavior also
reveals that men
and women
generally car shop
in the same way

Men and women spend comparable
amounts of time on the site and
view similar amounts of pages

TIME AND VIEWS PER SESSION



Both genders also engage in the same
pre-buying activities to a similar extent

SHARE OF ACTIVITIES BY GENDER

	GAP*
General Search	+1% W
Pricing and Reviews (New)	+4% M
Pricing and Reviews (Used)	+2% M
Articles	+2% M
Tools	+1% M
Inventory (Used)	0%
Photos	+1% W
Inventory (New)	0%
Dealer Research	+1% W

*Gap differences in percentage points



KEY FINDINGS

MILLENNIALS: CLOSING THE GAP

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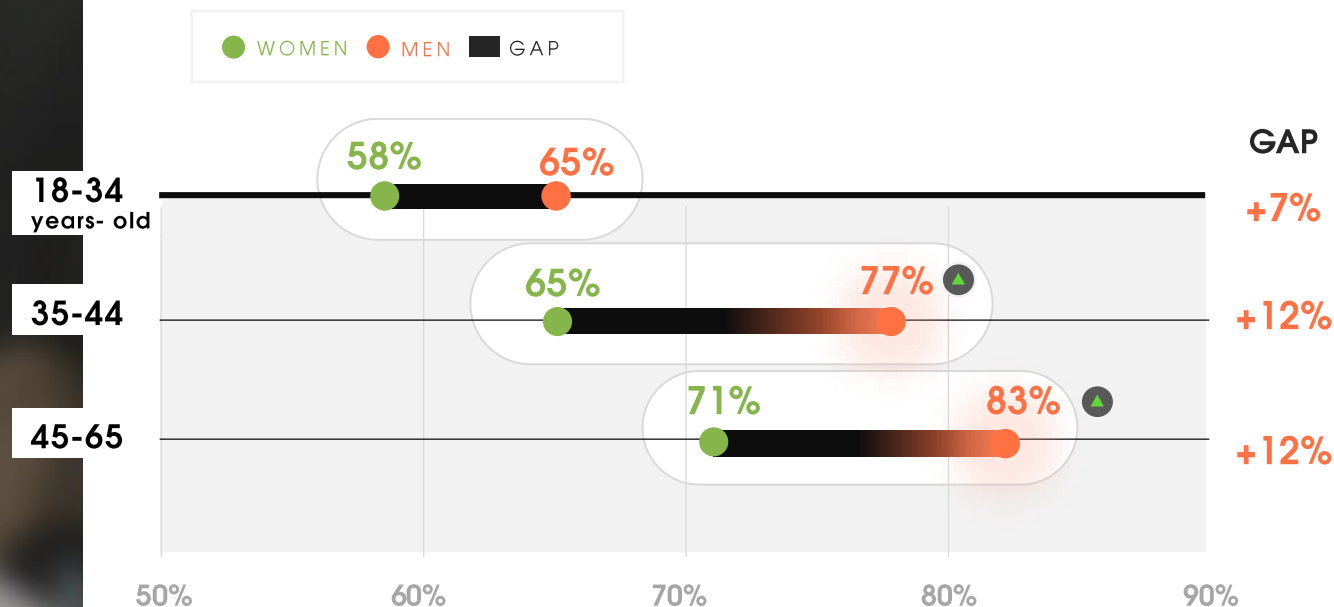
BENEFITS OF PERSONALIZATION

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Across generations,
millennials feel
more similarly
well-informed
compared to older
generations

EMOTIONS DECIDING WHAT TO BUY

Well-informed





KEY FINDINGS

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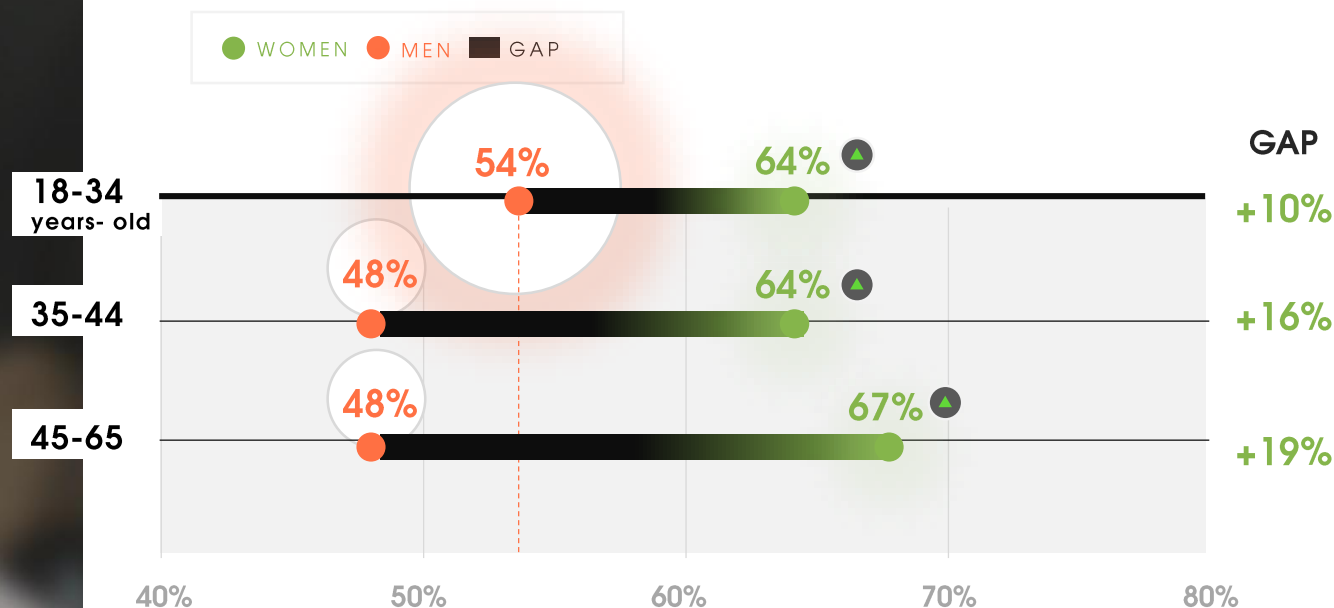
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Overall, the majority of women consider themselves to be equals or better than men at car shopping.

Millennial men are more likely to think that women are equals or better than men at car shopping.

“Women are equals or better than men at car shopping”





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Both men and women are confident at the dealership

Based to total; % Feel much more/somewhat more like this
Q10. How do you feel when you are at the dealership browsing but not ready to buy?
Q11. How do you feel when you are taking a test drive at the car dealership?
Arrows indicate significant differences at a 95% level of confidence.

BROWSING AT THE DEALER

Confident



I know exactly what I'm there to look at

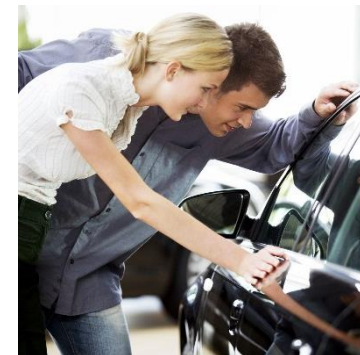


EMOTIONS TAKING A TEST DRIVE

Calm



I can take my time test driving



"It's important I show up with facts and am well-versed. Knowledge is power. Hey, I know what I'm talking about."
- **Millennial Female**



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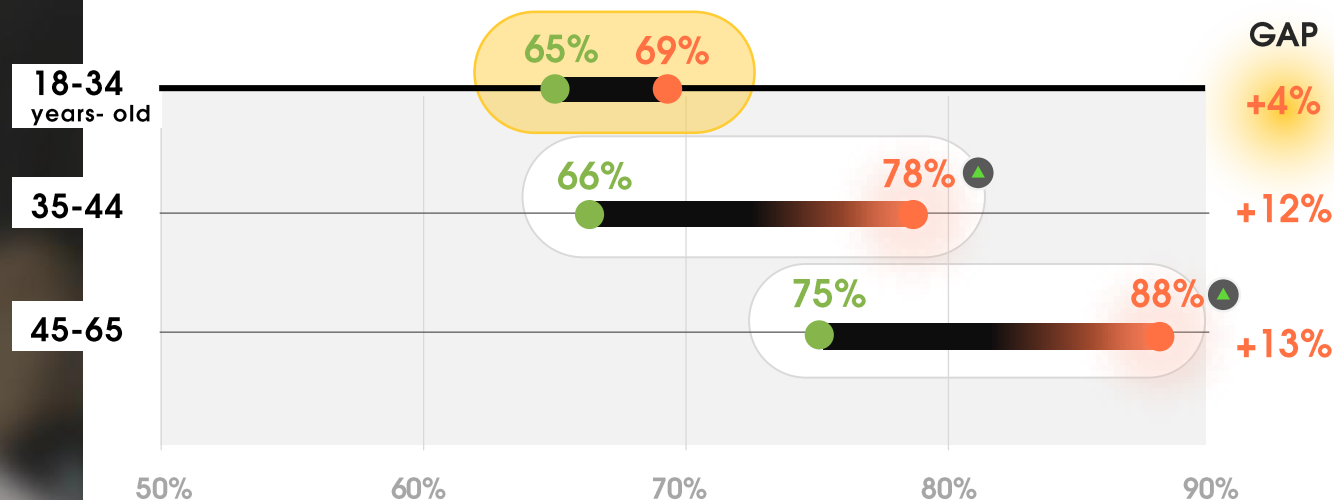
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But confidence levels between millennial men and women are more similar than between older generations

BROWSING AT THE DEALER

Confident

● WOMEN ● MEN ■ GAP





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Over 70% of both men and women feel self-assured during the buying and negotiating process

Based to total; % Feel much more/somewhat more like this
Q9. How do you feel when you are deciding what car to buy?
Arrows indicate significant differences at a 95% level of confidence.

EMOTIONS DECIDING WHAT TO BUY

Self-assured



Empowered



Exhilarated



"I come equipped and negotiate for lower prices during the bidding process."

Gen X Male

"It's empowering as a female going into a man's world and being able to call the shots."

Millennial Female

"I can't wait to go car shopping. It's a heyday for me. I make an event out of it."

Millennial Male



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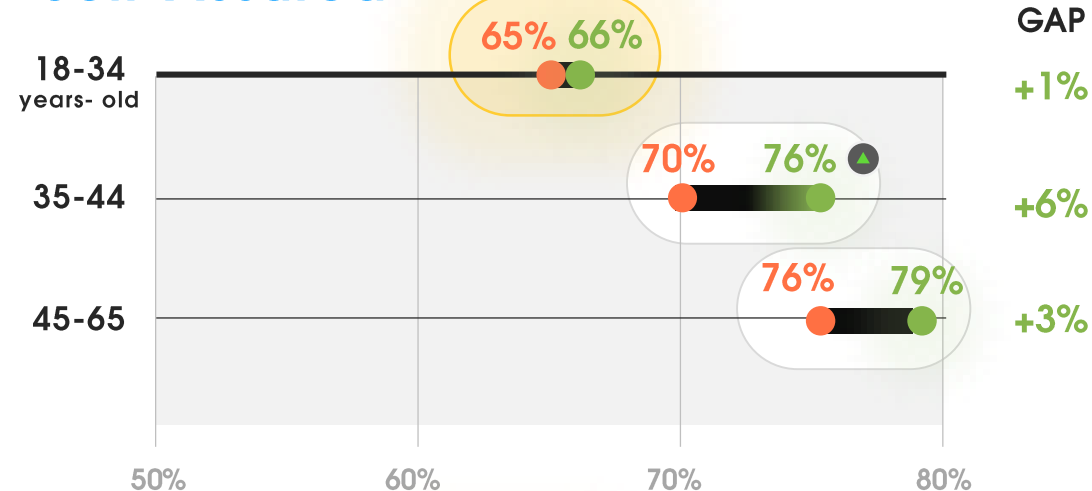
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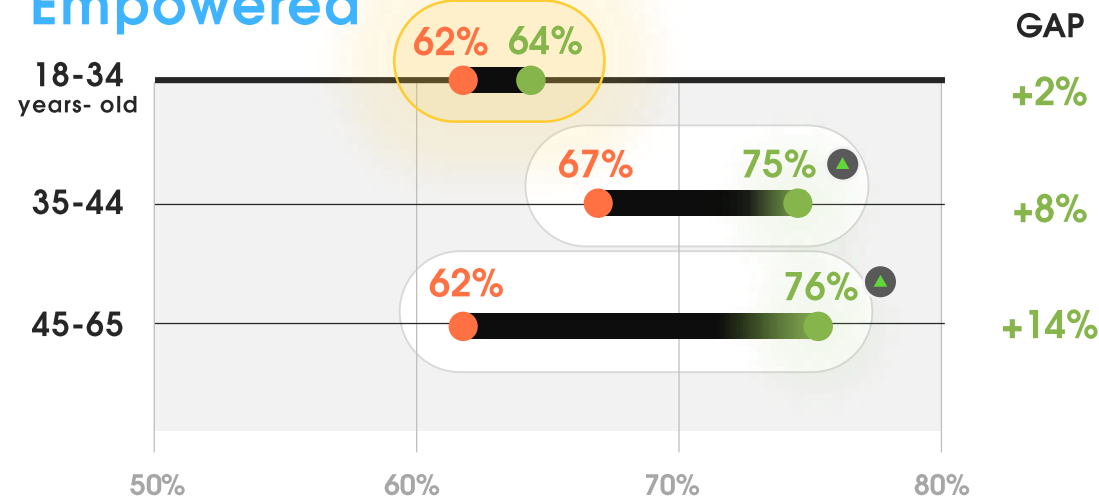
But, millennial men and women feel similar levels of self-assurance and empowerment, with the gap wider in older generations

BUYING AND NEGOTIATING

Self-Assured



Empowered





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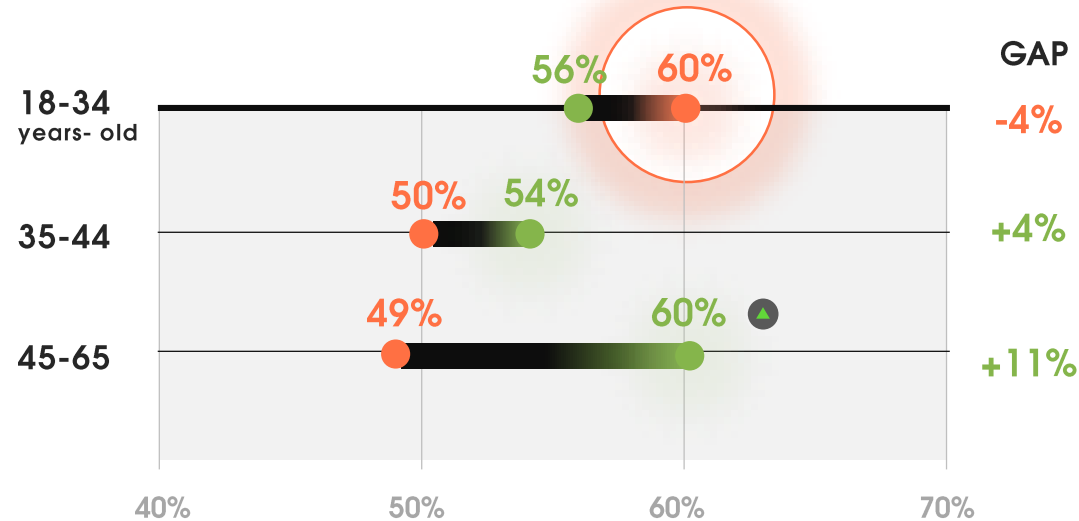
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More younger men agree that women are good negotiators than men in older generations

“Women are equals or better than men at **negotiating a car purchase**”

● WOMEN ● MEN ■ GAP





KEY FINDINGS

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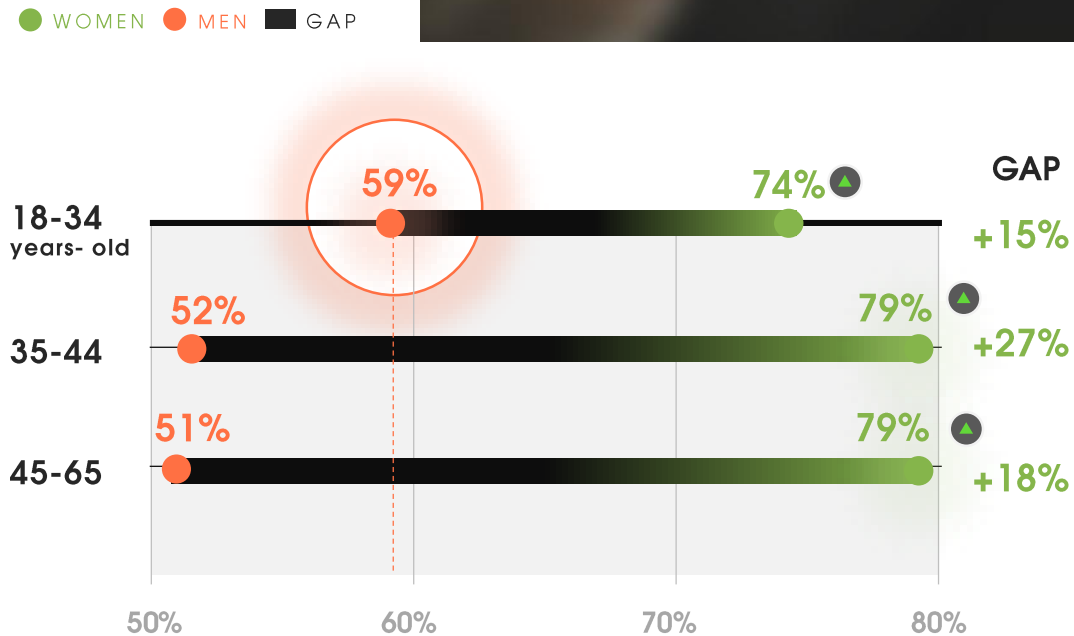
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More millennial men think that women are equally or more logical during the overall car shopping process than older generations

“Women are equals or better than men at **being logical during car shopping**”





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At the end of the process, women feel more assured that they made the best choice

EMOTIONS BUYING & NEGOTIATING

Like a winner



Happy



Sure I made the best choice



"I like to negotiate; it makes me feel like I'm winning."

Gen X Male

"It has to feel right. I get in a car feeling like we're going to be together for a while or it's not for me."

Millennial Female



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Millennials are closing the gender gap because of changes in gender roles due to women's increasing economic clout over the past 15+ years.



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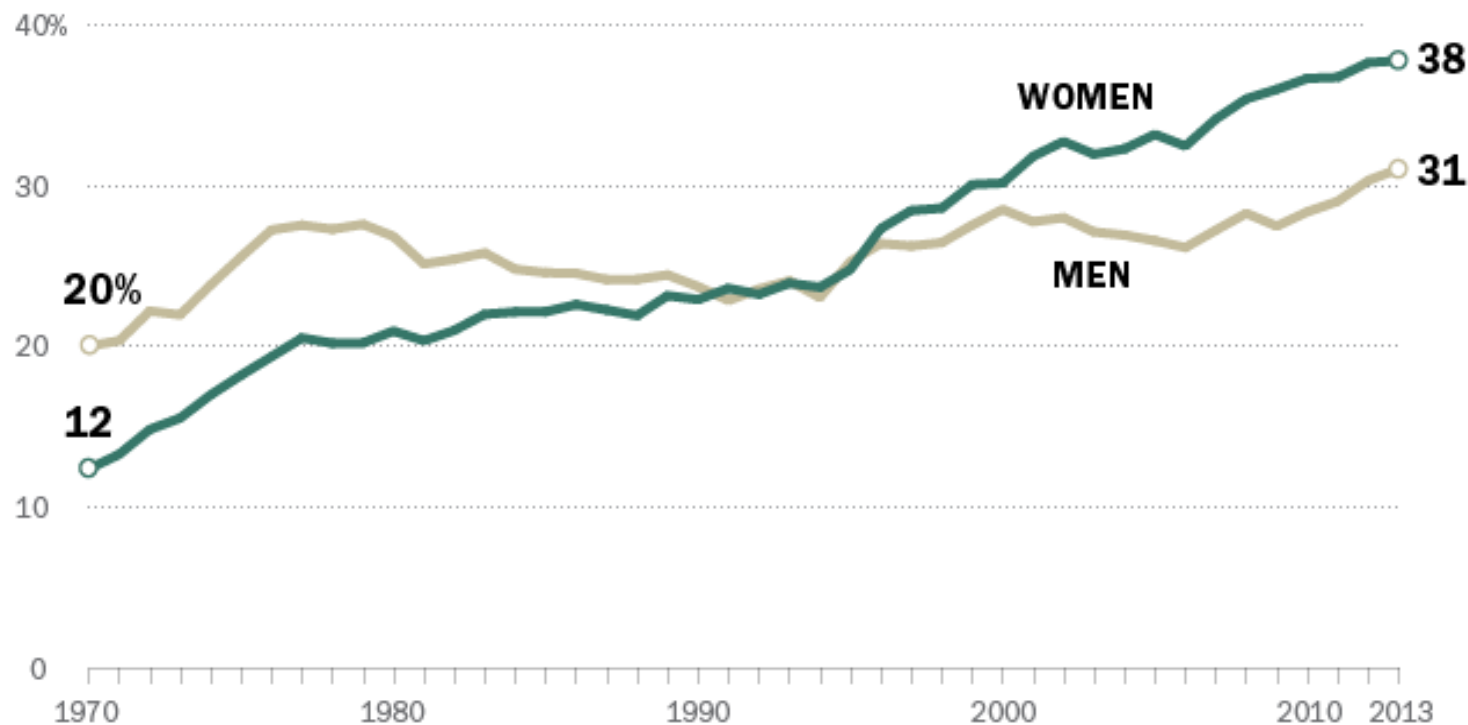
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Women are increasingly better educated than men when they enter the work force

In 2013, 38% of 25-32 year-old women had a college degree, versus only 31% of men.

% OF 25-32 YEAR-OLDS WITH AT LEAST A FOUR-YEAR COLLEGE DEGREE





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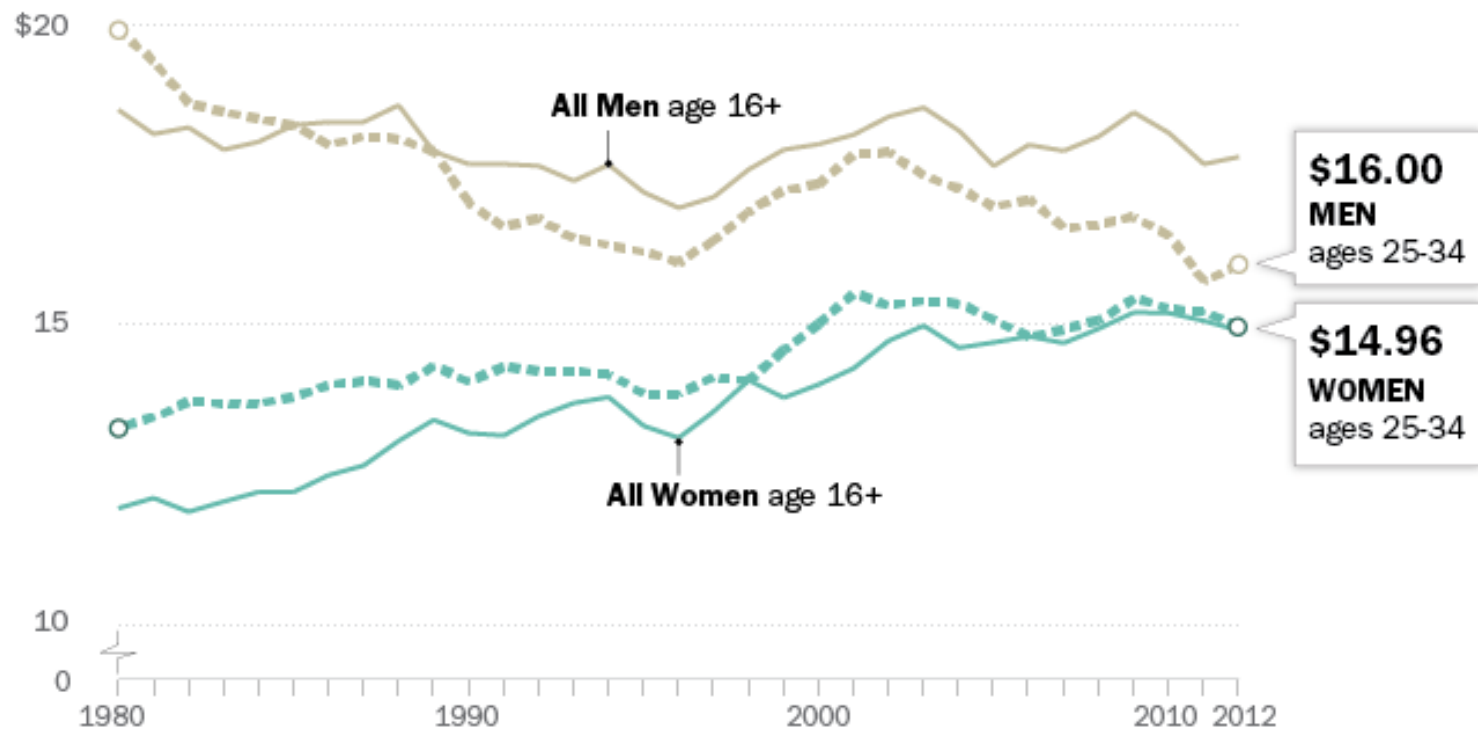
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Women are earning more than before (though there's still a gender pay gap)

Women aged 25-34 are paid an average of \$14.96 per hour, compared to \$16.00 among men, narrowing a gap of more than \$7 in 1980 to just over \$1 in 2012.

MEDIAN HOURLY EARNINGS

in 2012 dollars





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MILLENNIALS
ARE CLOSING THE GENDER GAP IN CAR SHOPPING

Why does this matter?



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Women and millennials are a sizeable influential population

It's estimated that women influence 80% of car purchases.

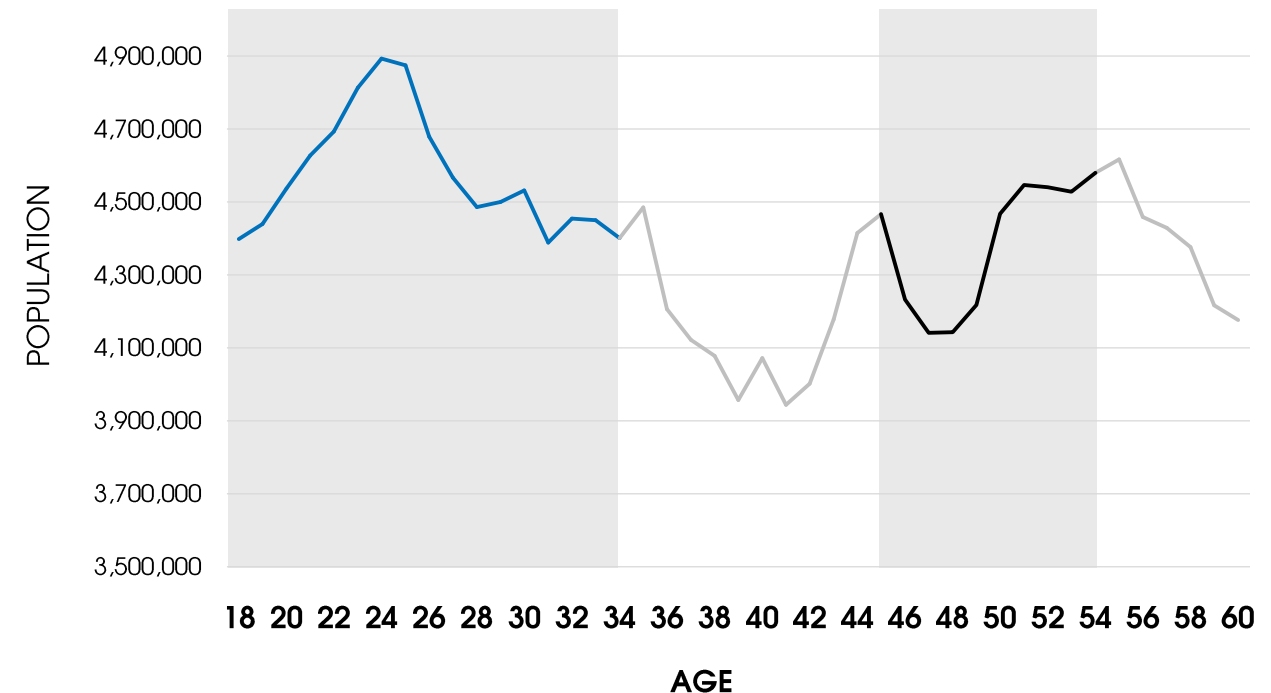
Millennial purchase power is estimated to be \$200 billion direct purchasing power and \$500 billion indirect spending, due to their large influence on the spending of their baby boomer parents.

Source: Kit, Yarrow and O'Donnell, Jayne. Gen BuY: How Tweens, Teens, and Twenty-Somethings Are Revolutionizing Retail. 2009.
Source: National Chamber Foundation

US POPULATION BY AGE

Source: US Census Bureau 2015 Population Estimates

Millennials have surpassed **Baby Boomers** as America's largest generation at 75.4 million, and by 2017, millennials will have more spending power than any other generation





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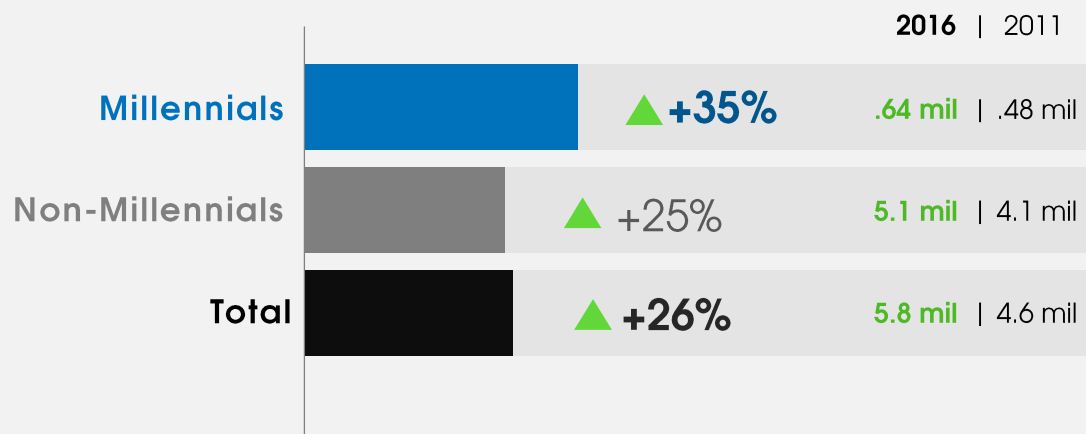
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Millennials have the potential to become the predominant consumption group in the automotive industry

Millennials' sales growth is outpacing industry at large

New cars registered to millennials has grown **35%** over the past five years while total new car registrations has grown **26%**

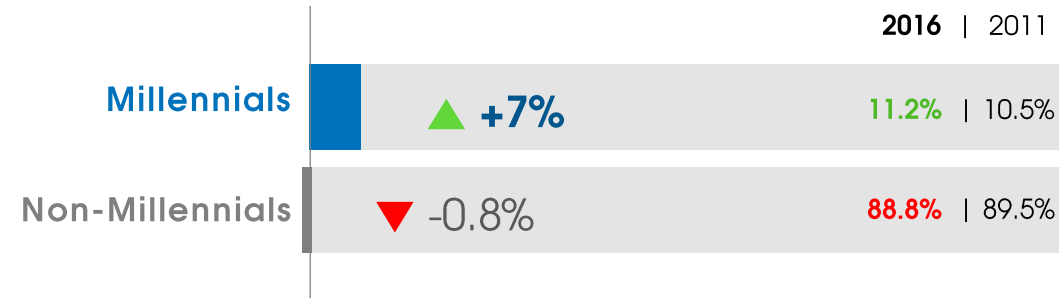
VOLUME FIVE-YEAR GROWTH



Millennials have become a larger buyer presence in the auto industry

Millennial market share for new vehicles has increased from **10.5%** in 2011 to **11.2%** in 2016

MARKET SHARE FIVE-YEAR GROWTH



SOURCE: Polk, January - July 2016



Women's influence appears to only be increasing

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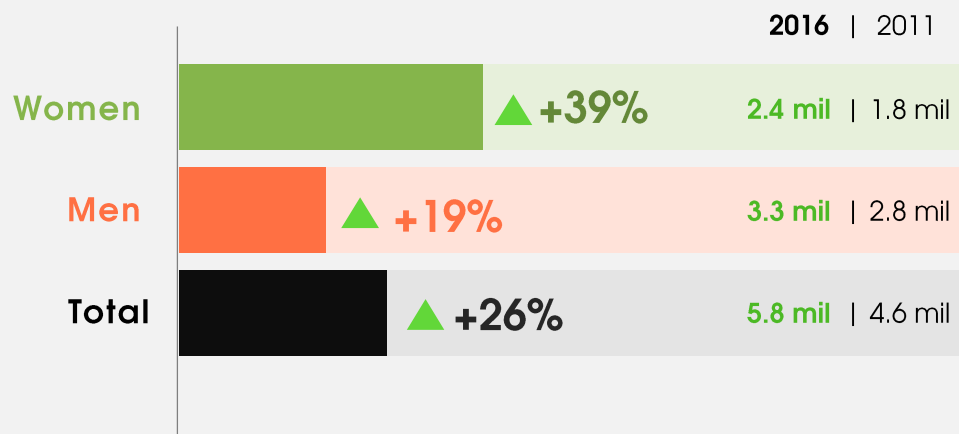
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Women are seeing larger growths in volume than men

The volume of new vehicle registrations to women increased by **39%** over the past 5 years, compared to **19%** for men.

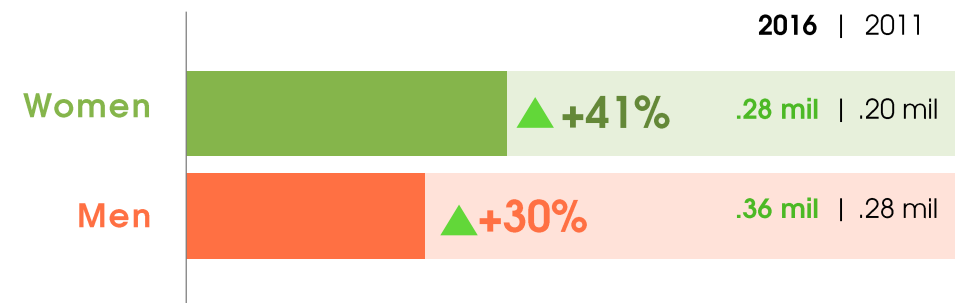
VOLUME FIVE-YEAR GROWTH (ALL AGES, BY GENDER)



Millennial women are also seeing a higher sales volume growth than millennial men, but the difference is closer than the population at large

New vehicle registrations to millennial women has increased **41%** over the past five years while millennial men have seen an increase of **30%**

VOLUME FIVE-YEAR GROWTH (MILLENNIALS, BY GENDER)



SOURCE: Polk, January - July 2016



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Overall, both men and women are looking for an improved shopping experience



NO PRESSURE SHOPPING

NO RISK/PRICE TRANSPARENCY

NO TIME WASTED

Women are
especially
strapped for
time



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MILLENNIALS
ARE CLOSING THE GENDER GAP IN CAR SHOPPING

But, there are **nuanced
differences** between men
and women



Women want a more efficient way to shop for a car

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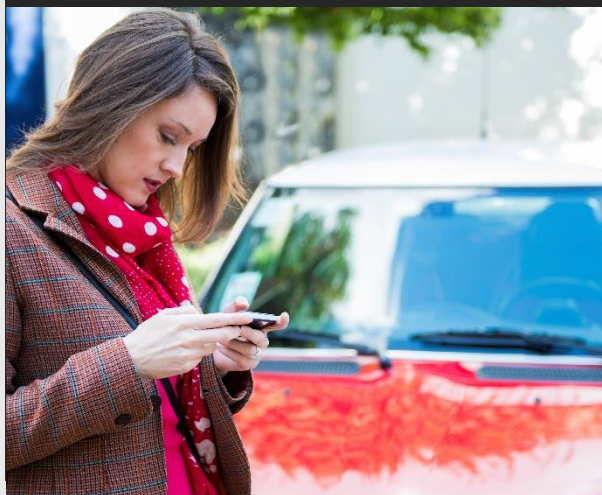
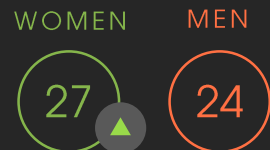
Women spend more time shopping for cars than men.

They wish that there was a faster, more efficient way to shop for a car.

"I don't have the time to be going from dealer to dealer. Here's my certificate. Here's what they quoted me. Where do I sign?"

– Gen X Female

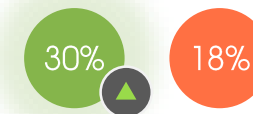
TIME SPENT SHOPPING FOR A CAR (HOURS)



Emotions deciding what to buy

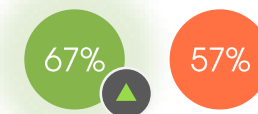
DON'T KNOW WHERE TO START

WOMEN MEN



I WISH THERE WAS A FASTER WAY TO DO THIS

WOMEN MEN





More women feel exhausted by the process than men

Nearly half of women don't want to deal alone and are exhausted by the process; some men feel this way too.

KEY FINDINGS

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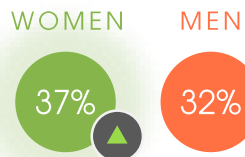
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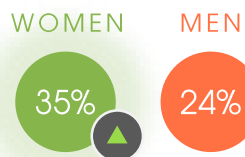
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Emotions deciding what to buy

THERE ARE TOO MANY CAR OPTIONS

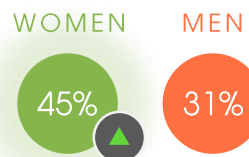


OVERWHELMED

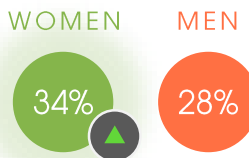


Emotions buying & negotiating

DON'T WANT TO NEGOTIATE ALONE

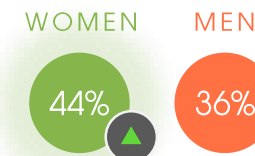


RUSHED INTO MAKING DECISIONS

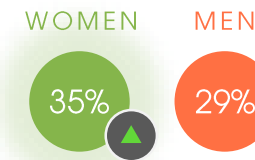


By the time they're done negotiating, their energy is spent

EXHAUSTED



STEAMROLLED



"I always feel like someone is lying to me or tricking me and making me feel bad that I might be walking away from a good deal." – **Millennial Female**

Based to total; % Feel much more/somewhat more like this
Q9. How do you feel when you are deciding what car to buy?
Q12. How do you feel when you are buying your car, including the negotiation?
Arrows indicate significant differences at a 95% level of confidence.



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More men say they savor the process and trust their intuition at the beginning

Some women also feel this way, but levels are stronger among men.

"I love negotiating. I love the deal. Let me talk to the manager. I'll get a good deal by spending the time."

– Gen X Male

Emotions deciding what to buy

I TRUST MY INTUITION

WOMEN

68%

MEN

76%



I SAVOR EACH MOMENT

WOMEN

33%

MEN

43%





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MARKET TO WHOLE PERSON

**Sweeping generalizations
will miss the mark**



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Most females want a streamlined process, but different types of shoppers have unique needs

FEMALES WANT A STREAMLINED PROCESS

Make car shopping
more efficient

Make car shopping
more convenient

Make me better
informed

Unique needs for the different types of shoppers:





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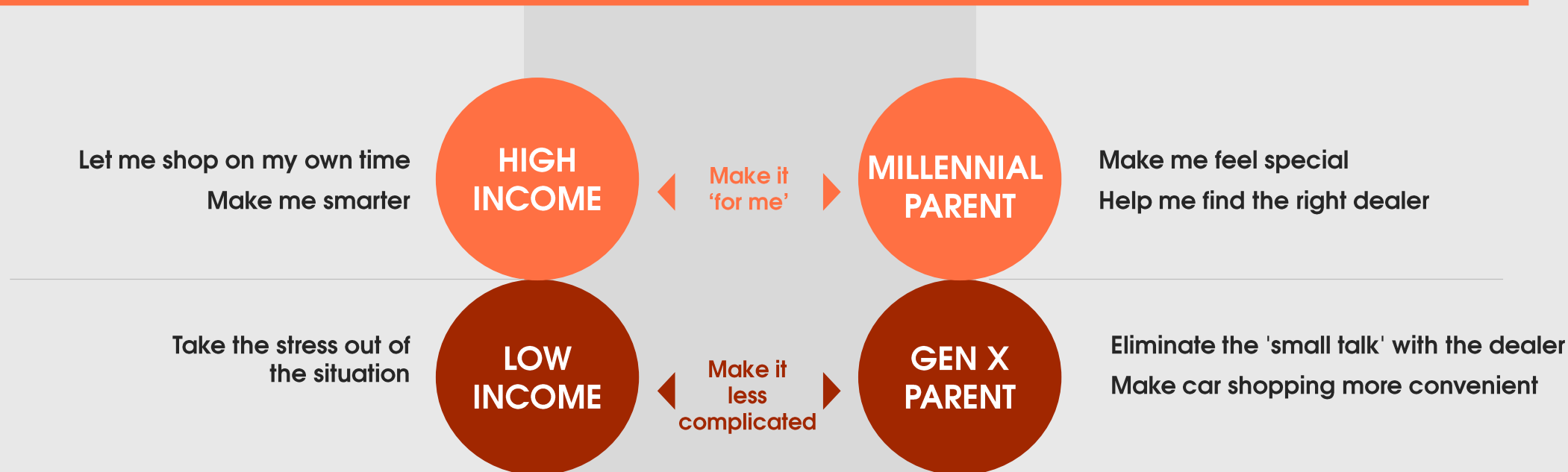
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Most males strive to know more when they shop, but different types of shoppers have unique needs

MALES WANT TO KNOW MORE

Make me better informed

Unique needs for the different types of shoppers:





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Edmunds' site data also reveals that men and women divide by pre-buying activity focus and journey stages, not gender

These groups show car shoppers at any given time are at different stages with different needs and priorities

Edmunds.com Activity Clusters

SHARE OF VISITORS BY GENDER

GAP*

Article Reader	+0.5% M
Tools User	+1% M
Researcher	+2% M
Inventory Viewer	+1% W

Edmunds.com Journey Stages

SHARE OF VISITORS BY GENDER

GAP*

Upper Funnelers	+3% W
Article Readers	+0.4% M
Early Researchers	+2% M
Ready to Buy	+0.5% M

*Gap differences in percentage points



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**BENEFITS OF
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BENEFITS OF PERSONALIZATION

**Personalization is critical to all
for improving the car shopping
experience**



Personalization allows you to market to the whole person, while delivering on the benefits that both men and women are asking for

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OVERALL BETTER EXPERIENCE

WANT CAR SHOPPING TO BE...

Makes it more fun (Pinterest)
Makes my life easier (Amazon, Pinterest)

PERSONALIZED SHOPPING TOOLS WILL...

Makes car buying more fun
Makes me better informed
Makes my life easier

NO PRESSURE SHOPPING

Lets me shop on my own time (Amazon)
I can browse on my own without any pressure (Clothes)

Takes the stress out of the situation
Lets me shop on my own time
Eliminates the 'small talk' with the dealer

NO RISK/PRICE TRANSPARENCY

Helps me get a good value (Amazon)
There are no hidden fees (Clothes, TV)
The price I see is the price I pay (Clothes, TV)
I can return it for almost any reason (Clothes, TV)

Helps me get a good car value

NO TIME WASTED

It takes much less time to buy (TV)
More convenient (Amazon)
More efficient (Amazon)
Helps me find what I need (Amazon, Pinterest)
I can compare choices more easily (TV)

Makes car shopping more efficient
Makes car shopping more convenient
Helps me find the right dealer



Both men and women are open to personalization

The top 5 tools are the same for men and women

CAR SHOPPING TOOLS OPEN TO USING BASED TO TOTAL

	WOMEN	MEN
Finding the exact car you want	90% ▲	86%
Tailored price alerts	80%	76%
Personalized emails	78%	78%
Using virtual reality for an up-close look at car features	76%	75%
Car results determined by artificial intelligence	74%	73%
Search or ask questions using voice activation	73%	71%
A personal assistant on your smartphone	71%	70%
Automated online system (chat bot)	69%	67%
Location-based alerts	69%	67%
Dealer text messages	62%	60%
Car maker text messages	60%	61%

Q17. Which of the following best describes how you feel about the tool described below as part of a personalized car shopping tool?

Arrows indicate significant differences at a 95% level of confidence.

Attributes truncated for simplicity – please see Appendix slide for full text description shown to the respondent.

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Millennials are closing the gender gap in car shopping

IN CONCLUSION

Men and women aren't really different when it comes to car shopping.

It's important for both genders to feel prepared when shopping for a car. They'll research everything, which boosts their confidence.

Sweeping generalizations will miss the mark.

Even within gender, car shoppers are at different parts of the journey and doing different activities.

Millennial men and women are most alike.

Young women are just as confident and empowered car shoppers as young men. Millennial men credit their female counterparts as being capable negotiators, more so than older generations.

Personalization is critical to all shoppers.

Men and women desire a better car shopping process and are open to using the personalized tools that will address these needs.

Men and women are still different in nuanced ways.

Women want a more efficient shopping process, but some feel overwhelmed and exhausted, whereas more men say they savor the journey.



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MAIN OBJECTIVE

Identify fresh insights on different demographics' behavior while shopping for a car. Better understand how we can improve the car shopping experience for today's consumer.

METHODOLOGY AND NOTES

Data collection: July 21 – August 3, 2016

25-minute online survey

Data weighted to reflect national representation among Adults 18-65

All significant differences noted at a 95% level of confidence

SAMPLE AND SURVEY DETAILS

TOTAL N = 3,129



FEMALES
n = 1,629



MALES
n = 1,500



MILLENNIALS
AGE 18-34
n = 1,078



GEN X
AGE 35-65
n = 2,051

SCREENING CRITERIA

- Adults 18-65
- Mix of:
- Recent car buyers (75%)/lessees (25%) in the past year
- Intenders (within next 6 months; must not be a first time buyer (must have purchased a vehicle before)
- Mix of makes and models owned and intended
- Mix of Luxury and Non-Luxury
- Household Income \$35k+ if living alone, \$50k+ if married/living with partners
- Purchase/Intend to purchase at a dealer, not exclusively online or with private sellers
- Joint or Primary driver
- No sensitive industry
- National spread



Description of car shopping tools

Q17. Which of the following best describes how you feel about the tool described below as part of a personalized car shopping tool?

KEY FINDINGS

MILLENNIALS:
CLOSING THE GAP

MARKET TO WHOLE
PERSON

BENEFITS OF
PERSONALIZATION

APPENDIX

Finding the exact car you want	Finding the exact car you want – right down to the features, specifications, even color
Tailored price alerts	Price alerts that are tailored to you, taking into account your personal financial situation and credit score
Personalized emails	Emails that include information (like price, where to buy) for the exact car you’ve been looking for
Using virtual reality for an up-close look at car features	Using virtual reality to have an up-close look at vehicle features, as if you were there in person (e.g., using your phone/tablet or computer you can experience the vehicle as if you’re actually sitting in it and driving it, like when you’re in the middle of a video game)
Car results determined by artificial intelligence	The ability to see a list of cars you will like based on a specific need that is determined by artificial intelligence (e.g. “My family enjoys camping at Yosemite” will show you results for all-wheel drive SUVs with lots of interior cargo space)
Search or ask questions using voice activation	The ability to search or ask questions using voice activation (e.g. saying “Find me a used black 2014 Jetta with less than 10,000 miles” will return the most relevant results that fit your request)
A personal assistant on your smartphone	A personal assistant on your smartphone for car shopping (like iPhone’s Siri or Android’s Google Assistant) that helps you with car information (e.g. if you ask “Tell me how much I should pay for a new GMC Acadia,” it will tell you the price range that others near you recently paid for theirs)
Automated online system (chat bot)	The ability to ask questions with an automated online system (chat bot) that will help you identify finance or lease terms that meet your personal financial situation and credit score.
Location-based alerts	Location-based alerts (you receive a notification when you are near a car you ‘like’)
Dealer text messages	Text messaging with the <u>dealer</u>
Car maker text messages	Text messaging with a representative from the car maker (e.g. Ford, Toyota, BMW)



KEY FINDINGS

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Cars carry a deep personal meaning for both men and women

MY CAR IS....

A reflection of myself

Fits my personality



A source of pride

My pride and joy



Get pleasure out of parking it right in front



In some ways, like home

My sanctuary



A member of my family



"My car is an extension of me. A reflection of personality."

Millennial Male

"I love my car. I love all the bells and whistles. It's a great boyfriend. He's treating me very well."

Millennial Female

"My car is like my best friend. It hauls precious cargo (kids back and forth)."

Female 35-65



Most feel good during the car shopping process, but there are some who would benefit from some improvements

KEY FINDINGS

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Most feel
like this:

Deciding
what to buy

I'm in charge of the
process ('I'm the navigator')

I trust my intuition

Excited

Browsing at
the Dealer

Confident

I know exactly what I'm
there to look at

I'm all business

Test Drive

Excited I found the
car for me

Calm

I can take my time

Buying and
Negotiating

Self-assured

I can just be myself

Empowered

But, some feel
there are ways
to improve the
process:

There are too many car options

Overwhelmed

Anxious

I wish the dealer would stop asking
me questions

A deer in headlights

Rushed

Nervous

I'm more confused than ever

Like I'm doing a stressful chore

I hope I don't get ripped off

Exhausted

Don't want to go in alone

Steamrolled

Rushed into making decisions

Based to total; % Feel much more/somewhat more like this



KEY FINDINGS

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An informed salesperson is important to everyone, especially women

DESIRED CAR SALESPERSON TRAITS

Informed and knowledgeable



Warm and friendly



A true partner



Close in my age



My gender

