

Report Price: £2463.80 | \$3990.00 | €3129.79

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"Car financing is finding greater acceptance among consumers now than before, while car makers and dealers are focusing more on brand building through improving their consumer service and advice, both through sales outlets and online, as well as focusing on their brand experience beyond just the cars themselves."

 Matthew Crabbe, Director of Research, Asia-Pacific

This report looks at the following areas:

- Financing finding its place
- · Brand building through service and advice
- · Building brand within the online matrix
- Accentuate the experience

Despite a slowing market and significant inventory levels, sales are still growing well, and are expected to continue. But competition is growing also, and car makers and dealers need to focus more on the experience of the car buyer, rather than the cars themselves, in building their brand reputation among consumers.

BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533

> Brazil 0800 095 9094

Americas +1 (312) 943 5250

+61 (0) 2 8284 8100

EMAIL: reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market



Report Price: £2463.80 | \$3990.00 | €3129.79

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Introduction

Definition

Report structure

Methodology

Abbreviations

Executive Summary

The market

Figure 1: China – Total volume passenger car sales, 2009-19

Companies and brands

Figure 2: China - Top 10 passenger cars brand market share, by volume (%), 2012/13

The consumer

Target consumer groups

Figure 3: China - Car purchasing key target consumer groups, June 2014

Car ownership status

Figure 4: Consumer car ownership status, June 2014

Car purchasing plan

Figure 5: Consumer intention to buy a car, June 2014

Car type ownership

Figure 6: Types of car already owned, by brand, June 2014

Replacement cars purchased

Figure 7: Types of replacement cars purchased, by price range, June 2014

Types of cars planned for purchase

Figure 8: Types of cars for planned purchase (versus already owned), by car body type, June 2014

Planned purchase choice factors

Figure 9: Factors important to consumers in choosing which car to buy, June 2014

Consumer habits when purchasing a car

Figure 10: Consumer habits when purchasing a car, June 2014

Attitudes by car brand

Figure 11: Correspondence map, by car brands, June 2014

Attitudes towards car buying process

Figure 12: Consumer attitudes towards the car buying process, by online versus offline information, June 2014

Key issues

Financing finding its place

Brand building through service and advice

Building brand within the online matrix

Accentuate the experience

What we think



VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com



Report Price: £2463.80 | \$3990.00 | €3129.79

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Issues and Insights

Financing finding its place

The facts

The implications

Brand building through service and advice

The facts

The implications

Building brand within the online matrix

The facts

The implications

Accentuate the experience

The facts

The implications

Trend Application

Collective Intelligence

Middle Class Heroes

Return to the Experts

Market Size and Forecast

Key points

Total passenger car sales

Figure 13: China – Total volume passenger car sales, 2009-19

New passenger car sales

Figure 14: China – Total volume new passenger car sales, 2009-19

New passenger car sectors

 $Figure\ 15:\ China-Passenger\ cars\ market\ segmentation,\ by\ volume\ (new\ registrations),\ 2011-13$

Second-hand passenger car sales

Figure 16: China – Total volume second-hand passenger car sales, 2009-19

Market Share

Key points

Passenger car brand shares

Figure 17: China - Passenger cars brand market share, by volume (%), 2011-13

Who's Innovating?

New energy cars

Rent, not buy

Service and brand experience

In-car intelligence

Companies and Brands



VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.cor



Report Price: £2463.80 | \$3990.00 | €3129.79

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Luxury foreign marques

BMW Group

Mercedes-Benz

Mid-range foreign marques

General Motors

Volkswagen Group

Toyota

Nissan

Hyundai

Domestic marques

Great Wall

Chery

BYD

Geely

The Consumer – Target Consumer Groups

Key points

Key target consumer groups

Figure 18: China – Car purchasing key target consumer groups, June 2014

The traditional cash buyers

Who they are

What they like

Marketing approach

The possible finance users

Who they are

What they like

Marketing approach

The professional advice seekers

Who they are

What they like

Marketing approach

The Consumer – Car Ownership Status

Key points

Consumer car ownership status

Figure 19: Consumer car ownership status, June 2014

Car ownership generally comes with age and income

Figure 20: Consumer car ownership status, by gender and age, June 2014

Figure 21: Consumer car ownership status, by marital status and presence of children, June 2014

Figure 22: Consumer car ownership status, by personal monthly income group, June 2014

Achieving car ownership doesn't quell the urge to trade up

BUY THIS REPORT NOW

VISIT: store.mintel.con

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

EMAIL: reports@mintel.con



Report Price: £2463.80 | \$3990.00 | €3129.79

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 23: Consumer car ownership status, by purchasing plan in the next 12 months, June 2014

The Consumer - Car Purchasing Plan

Key points

Almost two thirds of consumers planning to buy

Figure 24: Consumer intention to buy a car, June 2014

Young adults are the new key potential purchasers

Figure 25: Consumer intention to buy a car, by gender and age, June 2014

Figure 26: Consumer intention to buy a car, by marital status and presence of children, June 2014

Strong pent-up demand among lower income groups

Figure 27: Consumer intention to buy a car, by monthly personal income group, June 2014

Once smitten, forever in love

Figure 28: Consumer intention to buy a car, by car ownership status, June 2014

The Consumer – Car Type Ownership

Key points

Consumer car ownership by brand

Figure 29: Types of car already owned, by brand, June 2014

Consumer car ownership by car body type

Figure 30: Types of car already owned, by car body type, June 2014

Consumer car ownership by price range

Figure 31: Types of car already owned, by price range, June 2014

Consumer car ownership by fuel type

Figure 32: Types of car already owned, by fuel type, June 2014

Consumer car ownership by displacement

Figure 33: Types of car already owned, by displacement, June 2014

Car ownership by demographics

By brand

Figure 34: Types of car already owned, by brand and demographic group, June 2014

By price range

Figure 35: Types of car already owned, by price range and demographic group, June 2014

By car body type

Figure 36: Types of car already owned, by car body type and demographic group, June 2014

The Consumer – Replacement Cars Purchased

Key points

Types of replacement cars purchased by brand

Figure 37: Types of replacement cars purchased, by brand, June 2014

Types of replacement cars purchased by price range

Figure 38: Types of replacement cars purchased, by price range, June 2014

Types of replacement cars purchased by car body type



VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

EMAIL: reports@mintel.con



Report Price: £2463.80 | \$3990.00 | €3129.79

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 39: Types of replacement cars purchased, by car body type, June 2014

Types of replacement cars purchased by car fuel type

Figure 40: Types of replacement cars purchased, by car fuel type, June 2014

Types of replacement cars purchased by displacement

Figure 41: Types of replacement cars purchased, by displacement, June 2014

The Consumer – Types of Cars Planned for Purchase

Key points

Types of cars for planned purchase by brand

- Figure 42: Types of cars for planned purchase (versus already owned), by brand, June 2014
- Figure 43: Types of cars for planned purchase, by brand and target groups, June 2014

Types of cars for planned purchase by price range

- Figure 44: Types of cars for planned purchase (versus already owned), by price range, June 2014
- Figure 45: Types of cars for planned purchase, by price range and target groups, June 2014

Types of cars for planned purchase by car body type

- Figure 46: Types of cars for planned purchase (versus already owned), by car body type, June 2014
- Figure 47: Types of cars for planned purchase, by car body type and target groups, June 2014

Types of cars for planned purchase by car fuel type

- Figure 48: Types of cars for planned purchase (versus already owned), by car fuel type, June 2014
- Figure 49: Types of cars for planned purchase, by fuel type and target groups, June 2014

Types of cars for planned purchase by displacement

- Figure 50: Types of cars for planned purchase (versus already owned), by displacement, June 2014
- Figure 51: Types of cars for planned purchase, by displacement and target groups, June 2014

The Consumer – Planned Purchase Choice Factors

Key points

Consumer car purchase choice factors

- Figure 52: Factors important to consumers in choosing which car to buy, June 2014
- Figure 53: Factors important to consumers in choosing which car to buy, August 2013 and June 2014

Consumer car purchase choice factors by demographics

Figure 54: Factors important to consumers in choosing which car to buy, by gender and age, June 2014

Significant PR opportunities from forthcoming child car seat regulations

- Figure 55: Factors important to consumers in choosing which car to buy, by marital status, June 2014
- Figure 56: Factors important to consumers in choosing which car to buy, by personal monthly income group, June 2014

The Consumer – Consumer Habits when Purchasing a Car

Key points

Consumer habits when purchasing a car

- Figure 57: Consumer habits when purchasing a car, June 2014
- Figure 58: Consumer habits when purchasing a car, August 2013 and June 2014

Consumer habits when purchasing a car by demographics



VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

EMAIL: reports@mintel.cor



Report Price: £2463.80 | \$3990.00 | €3129.79

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 59: Consumer habits when purchasing a car, by gender and age, June 2014

Figure 60: Consumer habits when purchasing a car, by monthly personal income group, June 2014

The Consumer - Perceptions of Different Car Brands

Key points

Brand image test

Correspondence map methodology

Brand image analysis

Figure 61: Correspondence map, by car brands, June 2014

Consumer brand attitudes by trust and reputation

Figure 62: Consumer attitudes towards car brands, by trust and reputation, June 2014

Consumer brand attitudes by technical advancement and innovation

Figure 63: Consumer attitudes towards car brands, by technical advancement and brand innovation, June 2014

Consumer brand attitudes by consistently high quality and safety

Figure 64: Consumer attitudes towards car brands, by consistently high quality and safety, June 2014

Consumer brand attitudes by fun driving experience, expressing user personality and being adventurous

Figure 65: Consumer attitudes towards car brands, by fun driving experience, expressing user personality and being adventurous, June 2014

Consumer brand attitudes by considerate customer service

Figure 66: Consumer attitudes towards car brands, by considerate customer service, June 2014

Consumer brand attitudes by offering good value for money and worth paying more for

Figure 67: Consumer attitudes towards car brands, by offering good value for money, June 2014

Consumer brand attitudes by overall average score

Figure 68: Consumer attitudes towards car brands, by overall average score, June 2014

The Consumer – Attitudes Towards Car Buying Process

Key points

Attitudes towards online versus offline information

Figure 69: Consumer attitudes towards the car buying process, by online versus offline information, June 2014

Attitudes towards car finance options

Figure 70: Consumer attitudes towards the car buying process, by car finance options, June 2014

Attitudes towards new energy cars

Figure 71: Consumer attitudes towards the car buying process, by new energy cars, June 2014

Appendix - Market Size and Forecast

Figure 72: China – Total volume passenger car sales, by sector, 2009-19

Appendix – The Consumer – Car Ownership Status

Figure 73: Consumer car ownership status, June 2014

Figure 74: Most popular consumer car ownership status, by demographics, June 2014

Figure 75: Next most popular consumer car ownership status, by demographics, June 2014

Appendix - The Consumer - Car Purchasing Plan

Figure 76: Consumer intention to buy a car, June 2014

BUY THIS REPORT NOW VISIT: store.mintel.con

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

FMAIL: reports@mintel.com



Report Price: £2463.80 | \$3990.00 | €3129.79

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 77: Consumer intention to buy a car, by demographics, June 2014

Appendix – The Consumer – Car Type Ownership

- Figure 78: Types of car already owned, June 2014
- Figure 79: Most popular types of car already owned Brands, by demographics, June 2014
- Figure 80: Next most popular types of car already owned Brands, by demographics, June 2014
- Figure 81: Types of car already owned Price range, by demographics, June 2014
- Figure 82: Types of car already owned Body type, by demographics, June 2014
- Figure 83: Types of car already owned Fuel type, by demographics, June 2014
- Figure 84: Types of car already owned Displacement, by demographics, June 2014
- Figure 85: Types of replacement cars purchased, June 2014

Appendix – The Consumer – Types of Cars Planned for Purchase

- Figure 86: Types of cars for planned purchase, June 2014
- Figure 87: Most popular types of cars for planned purchase Brands, by demographics, June 2014
- Figure 88: Next most popular types of cars for planned purchase Brands, by demographics, June 2014
- Figure 89: Types of cars for planned purchase Price range, by demographics, June 2014
- Figure 90: Types of cars for planned purchase Price range, by demographics, June 2014 (continued)
- Figure 91: Types of cars for planned purchase Body type, by demographics, June 2014
- Figure 92: Types of cars for planned purchase Fuel type, by demographics, June 2014
- Figure 93: Types of cars for planned purchase Displacement, by demographics, June 2014

Appendix – The Consumer – Planned Purchase Choice Factors

- Figure 94: Factors important to consumers in choosing which car to buy, June 2014
- Figure 95: Most popular factors important to consumers in choosing which car to buy Rank 1, by demographics, June 2014
- Figure 96: Next most popular factors important to consumers in choosing which car to buy Rank 1, by demographics, June 2014
- Figure 97: Most popular factors important to consumers in choosing which car to buy Rank 2, by demographics, June 2014
- Figure 98: Next most popular factors important to consumers in choosing which car to buy Rank 2, by demographics, June 2014
- Figure 99: Most popular factors important to consumers in choosing which car to buy Rank 3, by demographics, June 2014
- Figure 100: Next most popular factors important to consumers in choosing which car to buy Rank 3, by demographics, June 2014

Appendix – The Consumer – Consumer Habits when Purchasing a Car

- Figure 101: Consumer habits when purchasing a car, June 2014
- Figure 102: Consumer habits when purchasing a car Information channels, by demographics, June 2014
- Figure 103: Consumer habits when purchasing a car New energy cars, by demographics, June 2014
- Figure 104: Consumer habits when purchasing a car Availability, by demographics, June 2014
- Figure 105: Consumer habits when purchasing a car Price, by demographics, June 2014
- Figure 106: Consumer habits when purchasing a car, by most popular consumer attitudes towards car brands Volkswagen, June 2014
- Figure 107: Consumer habits when purchasing a car, by next most popular consumer attitudes towards car brands Volkswagen, June 2014
- Figure 108: Consumer habits when purchasing a car, by most popular consumer attitudes towards car brands Audi, June 2014
- Figure 109: Consumer habits when purchasing a car, by next most popular consumer attitudes towards car brands Audi, June 2014
- Figure 110: Consumer habits when purchasing a car, by most popular consumer attitudes towards car brands BMW, June 2014

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

EMAIL: reports@mintel.con



Report Price: £2463.80 | \$3990.00 | €3129.79

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- Figure 111: Consumer habits when purchasing a car, by next most popular consumer attitudes towards car brands BMW, June 2014
- Figure 112: Consumer habits when purchasing a car, by most popular consumer attitudes towards car brands Mercedes-Benz, June 2014
- Figure 113: Consumer habits when purchasing a car, by next most popular consumer attitudes towards car brands Mercedes-Benz,
- Figure 114: Consumer habits when purchasing a car, by most popular consumer attitudes towards car brands Toyota, June 2014
- Figure 115: Consumer habits when purchasing a car, by next most popular consumer attitudes towards car brands Toyota, June 2014
- Figure 116: Consumer habits when purchasing a car, by other consumer attitudes towards car brands Toyota, June 2014
- Figure 117: Consumer habits when purchasing a car, by most popular consumer attitudes towards car brands Honda, June 2014
- Figure 118: Consumer habits when purchasing a car, by next most popular consumer attitudes towards car brands Honda, June 2014
- Figure 119: Consumer habits when purchasing a car, by other consumer attitudes towards car brands Honda, June 2014
- Figure 120: Consumer habits when purchasing a car, by most popular consumer attitudes towards car brands Buick, June 2014
- Figure 121: Consumer habits when purchasing a car, by next most popular consumer attitudes towards car brands Buick, June 2014
- Figure 122: Consumer habits when purchasing a car, by other consumer attitudes towards car brands Buick, June 2014
- Figure 123: Consumer habits when purchasing a car, by most popular consumer attitudes towards car brands Ford, June 2014
- Figure 124: Consumer habits when purchasing a car, by next most popular consumer attitudes towards car brands Ford, June 2014
- Figure 125: Consumer habits when purchasing a car, by other consumer attitudes towards car brands Ford, June 2014
- Figure 126: Consumer habits when purchasing a car, by most popular consumer attitudes towards car brands Hyundai, June 2014
- Figure 127: Consumer habits when purchasing a car, by next most popular consumer attitudes towards car brands Hyundai, June
- Figure 128: Consumer habits when purchasing a car, by other consumer attitudes towards car brands Hyundai, June 2014
- Figure 129: Consumer habits when purchasing a car, by most popular consumer attitudes towards car brands Chery, June 2014
- Figure 130: Consumer habits when purchasing a car, by next most popular consumer attitudes towards car brands Chery, June 2014
- Figure 131: Consumer habits when purchasing a car, by other consumer attitudes towards car brands Chery, June 2014
- Figure 132: Consumer habits when purchasing a car, by consumer attitudes towards the car buying process Issue 1 Online versus offline, June 2014
 Figure 133: Consumer habits when purchasing a car, by consumer attitudes towards the car buying process – Issue 2 Car finance
- options, June 2014 Figure 134: Consur Consumer habits when purchasing a car, by consumer attitudes towards the car buying process - Issue 3 New energy

Appendix – The Consumer – Perceptions of Different Car Brands

- Figure 135: Consumer attitudes towards car brands, June 2014
- Figure 136: Consumer attitudes towards car brands, June 2014 (continued)
- Figure 137: Most popular consumer attitudes towards car brands Volkswagen, by demographics, June 2014
- Figure 138: Next most popular consumer attitudes towards car brands Volkswagen, by demographics, June 2014
- Figure 139: Other consumer attitudes towards car brands Volkswagen, by demographics, June 2014
- Figure 140: Most popular consumer attitudes towards car brands Audi, by demographics, June 2014
- Figure 141: Next most popular consumer attitudes towards car brands Audi, by demographics, June 2014
- Figure 142: Other consumer attitudes towards car brands Audi, by demographics, June 2014
- Figure 143: Most popular consumer attitudes towards car brands BMW, by demographics, June 2014
- Figure 144: Next most popular consumer attitudes towards car brands BMW, by demographics, June 2014
- Figure 145: Other consumer attitudes towards car brands BMW, by demographics, June 2014
- Figure 146: Most popular consumer attitudes towards car brands Mercedes-Benz, by demographics, June 2014
- Figure 147: Next most popular consumer attitudes towards car brands Mercedes-Benz, by demographics, June 2014
- Figure 148: Other consumer attitudes towards car brands Mercedes-Benz, by demographics, June 2014





Report Price: £2463.80 | \$3990.00 | €3129.79

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 149: Most popular consumer attitudes towards car brands – Toyota, by demographics, June 2014

Figure 150: Next most popular consumer attitudes towards car brands - Toyota, by demographics, June 2014

Figure 151: Other consumer attitudes towards car brands - Toyota, by demographics, June 2014

Figure 152: Most popular consumer attitudes towards car brands - Honda, by demographics, June 2014

Figure 153: Next most popular consumer attitudes towards car brands - Honda, by demographics, June 2014

Figure 154: Other consumer attitudes towards car brands – Honda, by demographics, June 2014

Figure 155: Most popular consumer attitudes towards car brands - Buick, by demographics, June 2014

Figure 156: Next most popular consumer attitudes towards car brands - Buick, by demographics, June 2014

Figure 157: Other consumer attitudes towards car brands - Buick, by demographics, June 2014

Figure 158: Most popular consumer attitudes towards car brands - Ford, by demographics, June 2014

Figure 159: Next most popular consumer attitudes towards car brands - Ford, by demographics, June 2014

Figure 160: Other consumer attitudes towards car brands - Ford, by demographics, June 2014

Figure 161: Most popular consumer attitudes towards car brands - Hyundai, by demographics, June 2014

Figure 162: Next most popular consumer attitudes towards car brands - Hyundai, by demographics, June 2014

Figure 163: Other consumer attitudes towards car brands - Hyundai, by demographics, June 2014

Figure 164: Most popular consumer attitudes towards car brands - Chery, by demographics, June 2014

Figure 165: Next most popular consumer attitudes towards car brands - Chery, by demographics, June 2014

Figure 166: Other consumer attitudes towards car brands - Chery, by demographics, June 2014

Figure 167: Consumer attitudes towards car brands, by consumer attitudes towards the car buying process – Issue 1 Online versus offline, June 2014
Figure 168: Consumer attitudes towards car brands, by consumer attitudes towards the car buying process – Issue 2 Car finance

options, June 2014 Figure 169: Consumer attitudes towards car brands, by consumer attitudes towards the car buying process – Issue 3 New energy cars,

Appendix - The Consumer - Attitudes Towards Car Buying Process

Figure 170: Consumer attitudes towards the car buying process, June 2014

Figure 171: Agreement with the statement 'It is important to search for information online before deciding which car to buy', by

demographics, June 2014
Figure 172: Agreement with the statement 'Peer reviews on social networks have an influence on my car choice decision', by demographics, June 2014

Figure 173: Agreement with the statement 'There is a lack of useful information online that can help me make a car purchasing Figure 173: Agreement with the statement 'There is a lack of useful information online that can help me make a car purchasing decision', by demographics, June 2014
Figure 174: Agreement with the statement 'Speaking with car dealers in person before buying a car offers more help than searching for related information online', by demographics, June 2014
Figure 175: Agreement with the statement 'I would rather pay cash for a car/own it outright than use a finance option', by demographics, June 2014
Figure 174: Agreement with the statement 'There is a lack of our financing options which are quited to my people', by demographics

Figure 176: Agreement with the statement 'There is a lack of car financing options which are suited to my needs', by demographics,

Figure 177: Agreement with the statement 'Paying for a car using car financing gives me more control over my budget', by

Figure 178: Agreement with the statement 'I have limited knowledge about car financing products', by demographics, June 2014 Figure 179: Agreement with the statement 'New energy cars don't perform as well as a regular one', by demographics, June 2014

Figure 180: Agreement with the statement 'It's difficult to find a new energy car suitable for my needs', by demographics, June 2014

Figure 181: Agreement with the statement 'The government should have more favourable regulations for those who are planning to buy a new energy car', by demographics, June 2014

Appendix - Further Analysis

Figure 182: Target groups, by demographics, June 2014

Figure 183: Factors important to consumers in choosing which car to buy, by target groups, June 2014

Figure 184: Consumer habits when purchasing a car, by target groups, June 2014

Figure 185: Consumer attitudes towards car brands, by target groups, June 2014

BUY THIS REPORT NOW



Report Price: £2463.80 | \$3990.00 | €3129.79

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 186: Consumer attitudes towards the car buying process, by target groups, June 2014

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com