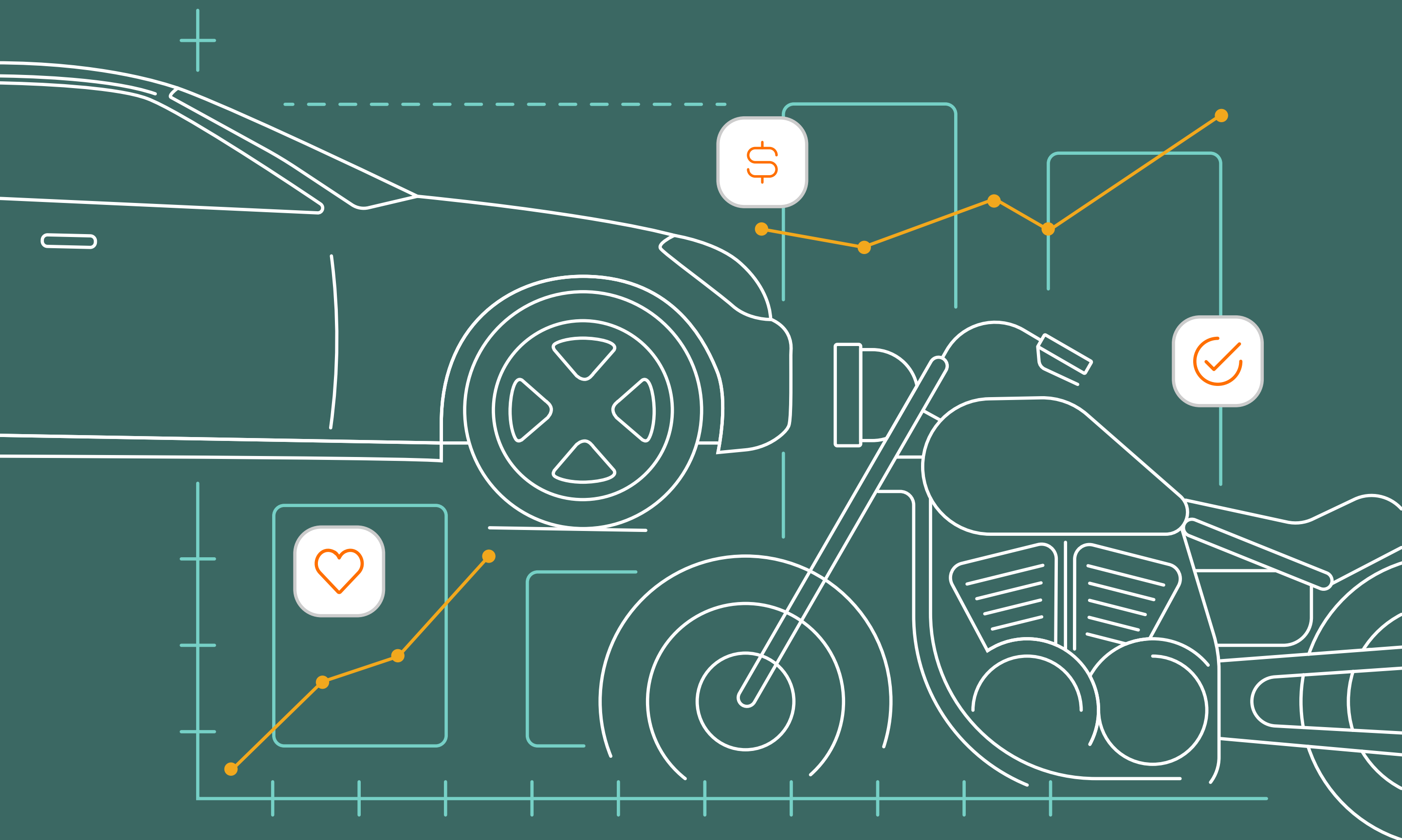


# Behind the Wheel

## Behavior That Drives Automotive Purchases



# A Look at Indonesia's **Automotive** Market

We connected to thousands of consumers from 350+ locations throughout Indonesia to find out what's driving automotive purchase habits. This report opens the hood and reveals consumer buying habits that are essential to understand for industry players.

## Leaning into Millennials and Gen-Z

While wide ranging in age, this report leans heavily into younger consumers - tapping into the purchasing behavior of the highly desired Millennial and Gen-Z segments



- 60% of the respondents were female.

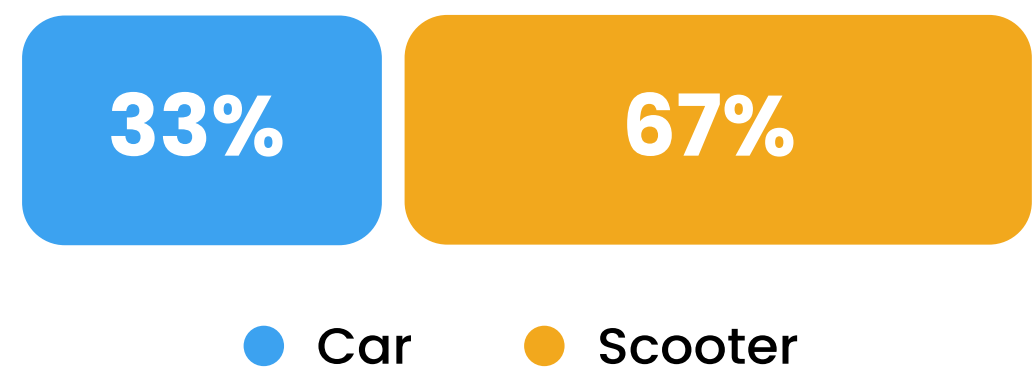
- 72% were under 30 years old and ~90% under 35.

## Strong Purchase Intent

Nearly half of respondents expressed interest in purchasing a vehicle.

- one third plan to buy a car over a scooter.

### Likelihood of Buying a Scooter vs a Car

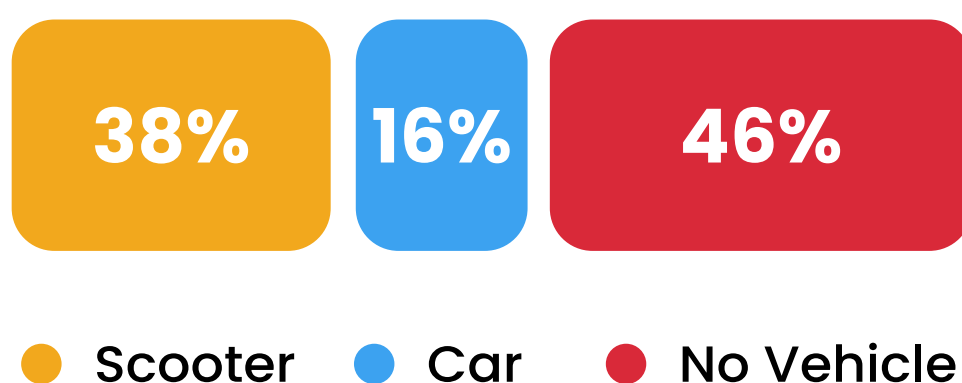


## Untapped Opportunities in Vehicle Ownership

In Indonesia, vehicle ownership is slightly higher among males than females. For both genders, there is a greater preference for scooters over cars.



### Vehicle Ownership

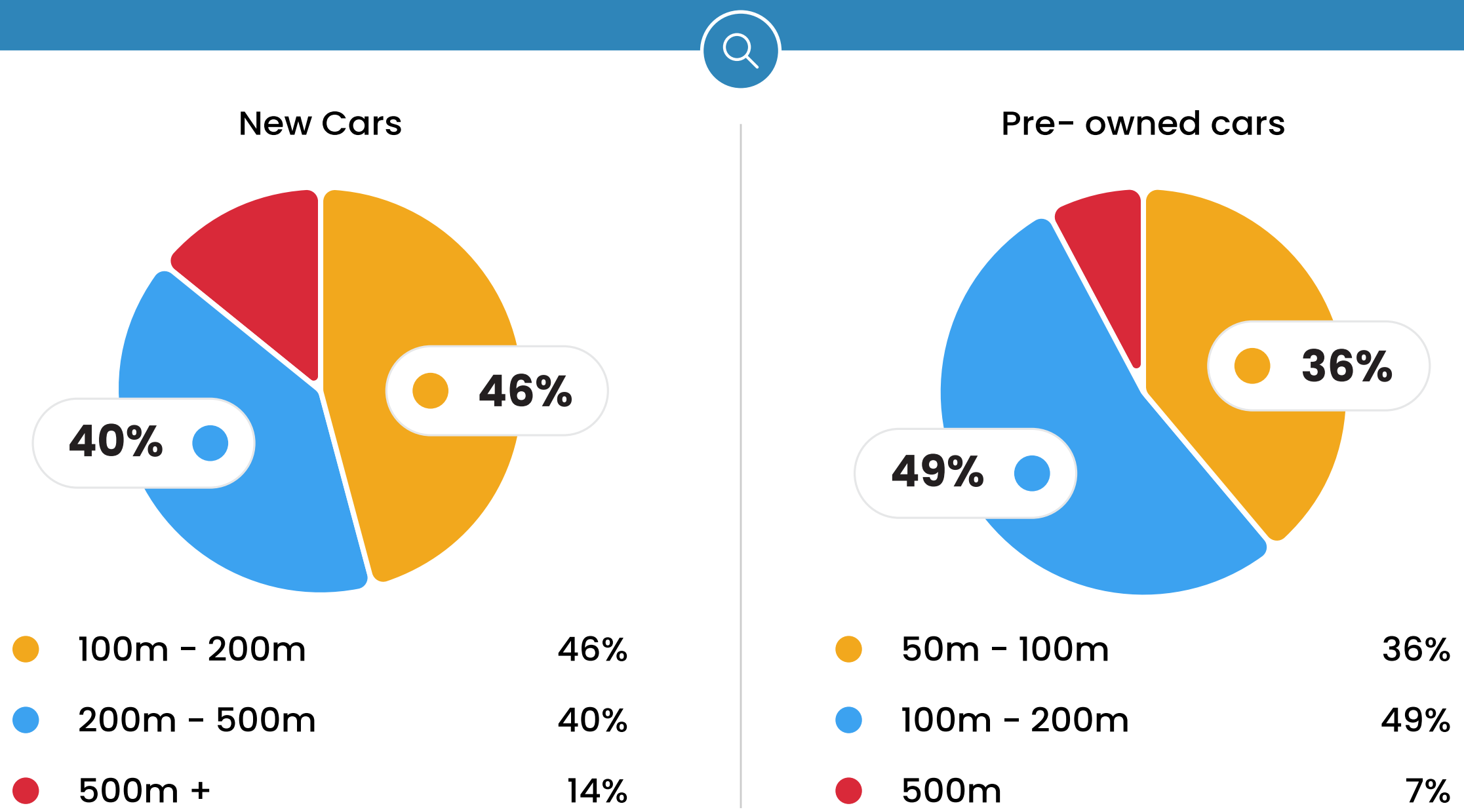


- Bounty was able to tap into car owners in a major way as our audience showed 2x the national average (16%) and 23% for the over 30s age group.

- Nearly 50% of respondents don't own a vehicle at all representing a massive opportunity for the industry.
- 3 out of every 10 vehicle owners are interested in selling or trading their current vehicles.
- Women are 1.25x more likely to not own a vehicle versus Men.
- Of car owners, Men represented 1.2x more than Women.

# Consumer Preferences

## Budget Considerations



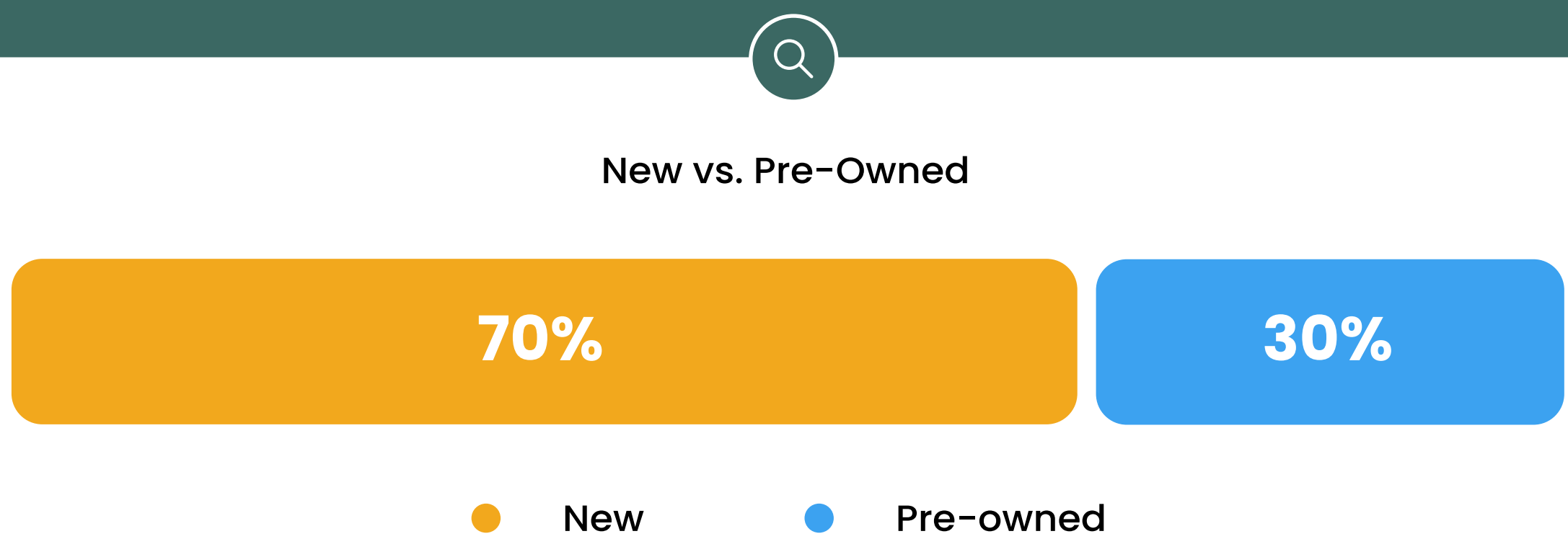
- The IDR 100–200m range was tops for both new cars (46%) and used (49%).
- New cars also saw substantial intent in the IDR 200–500m range, while used vehicles saw a spike in IDR 50–100m.

## Cruising Through Choices

To understand what drives vehicle purchases, we asked the respondents what factors they consider and what features they look at when buying cars or scooters.

### New vs. Pre-Owned

Those who do show interest in buying a vehicle show an overwhelming preference for new models versus pre-owned cars or scooters.



- Among those interested in purchasing a car, 73% are looking for a brand new car.
- Among those interested in purchasing a scooter, 68% want a new scooter instead of a pre-owned one.

## Brand doesnt matter

Interestingly, fuel efficiency was far and away the top consideration impacting vehicle purchases. Vehicle styling was on par with price and together with fuel economy were the top 3 considerations for respondents.



### Top Three Features



- Good fuel economy
- Looks great
- Price

● Only 11.9% of buyers consider the brand when making their purchases.

Brand name reputation featured far lower on the list at ~12% but ahead of issues such as entertainment systems (7.1%) and passenger capacity (4.1%).

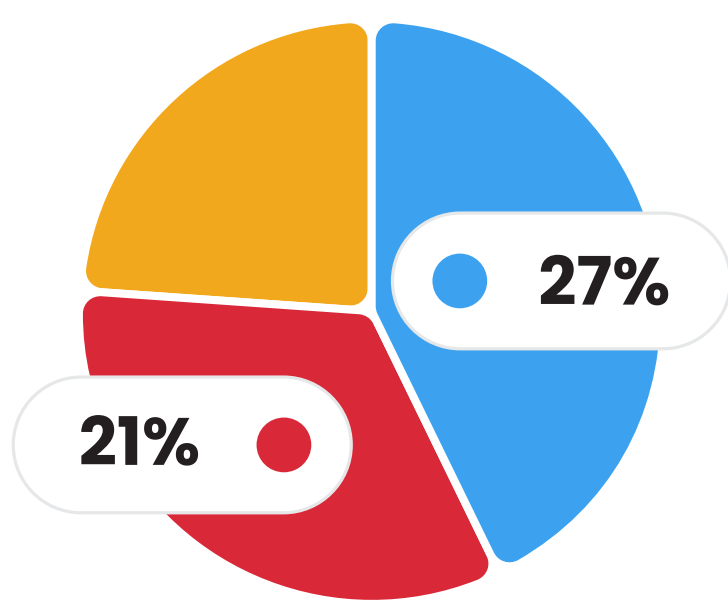
Overall, fuel type does not rank in the top 5 considerations but it is noteworthy that Electric has overtaken Diesel in customers' minds by a factor of 2-3x.

## e-wallet usage

Vehicle owners are digitally savvy, frequently using mobile wallets like Dana, Shopee Pay, GoPay, Ovo, and LinkAja. Dana is the most popular, especially among vehicle owners (+44% vs. non-owners), with equal preference among new and used vehicle owners. These preferences highlight the value of digital wallets in the after-purchase services and accessories market.

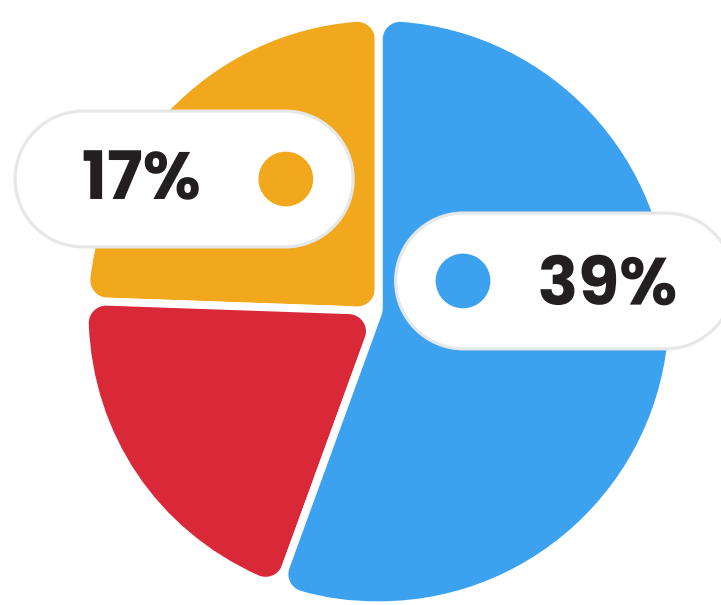


Top e-wallets for vehicle non-owners



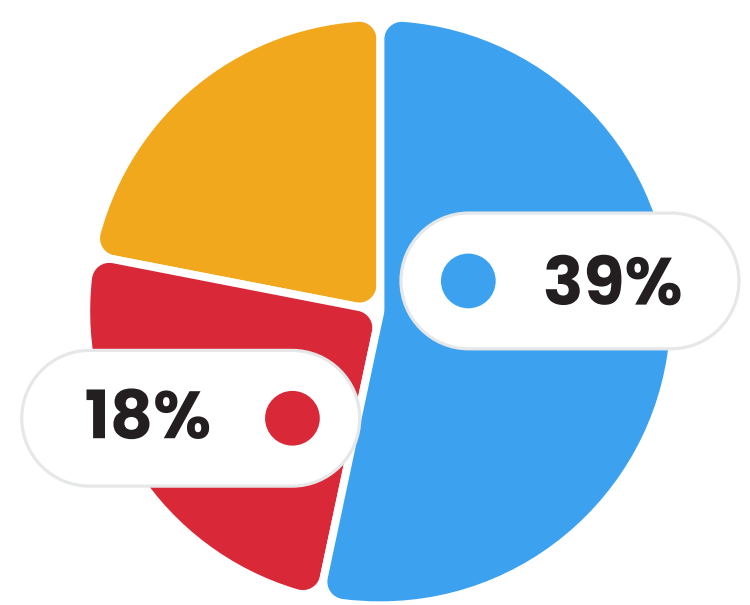
- Dana 27%
- Shopee Pay 21%
- GoPay 15%

Top e-wallets for new vehicle buyers



- Dana 39%
- Shopee Pay 14%
- GoPay 17%

Top e-wallets for used vehicle buyers



- Dana 39%
- Shopee Pay 18%
- GoPay 16%

# Beyond the Automotive Market

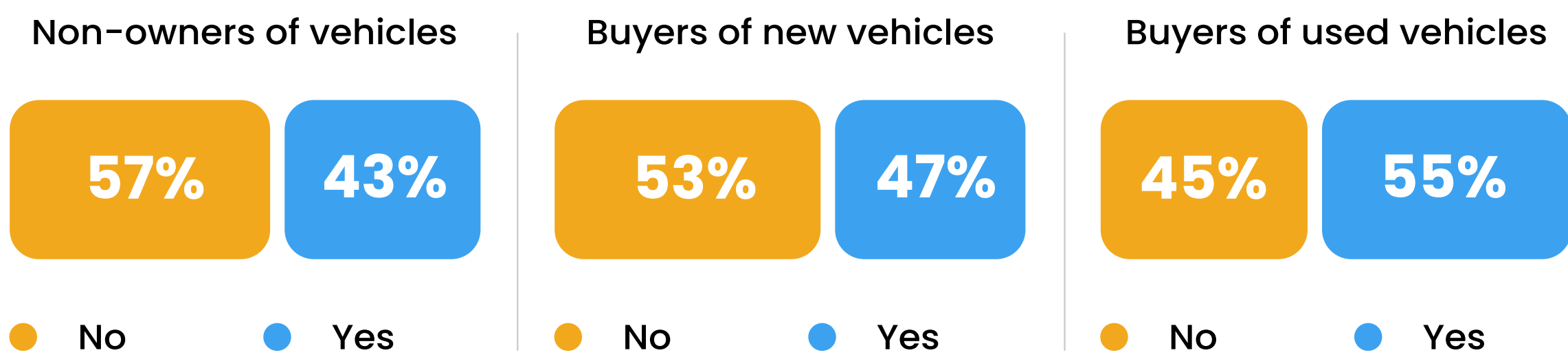
## Peripheral Impact

Indonesia is one of the few countries that do not have government mandated vehicle insurance. Bounty took the opportunity to ask respondents about their current insurance coverage as well as their future plans regarding travel and education, all categories that would have an influence on timing to buy a vehicle.

Interestingly, buyers of used vehicles exhibited the strongest indication to travel abroad in the coming months outpacing buyers of new vehicles and non-owners of vehicles.



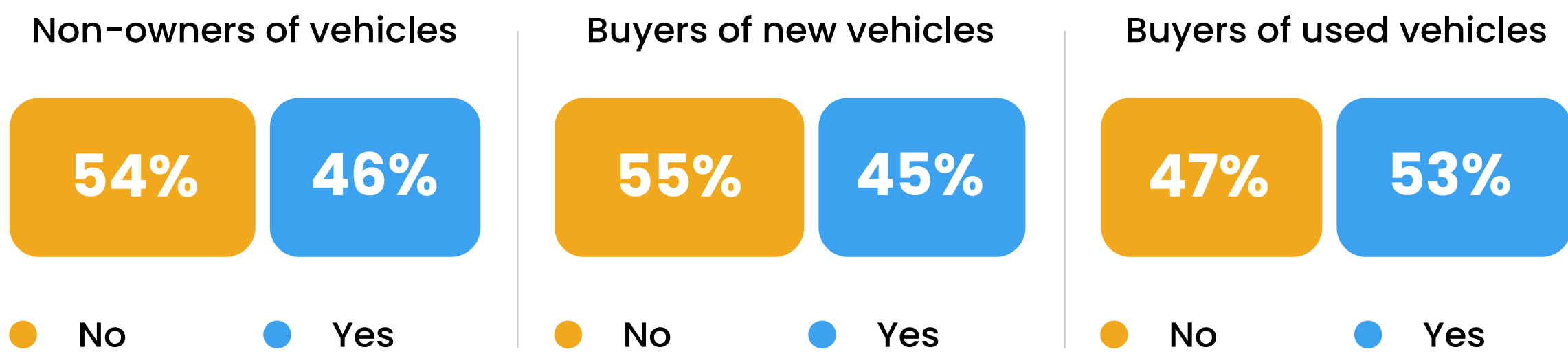
### Do you have plans to travel abroad?



Similarly, the majority of buyers of used vehicles expressed intent to go to college in the coming year. It is likely that this is representative of a younger cohort who would have more limited budgets to spread across education and commuting.



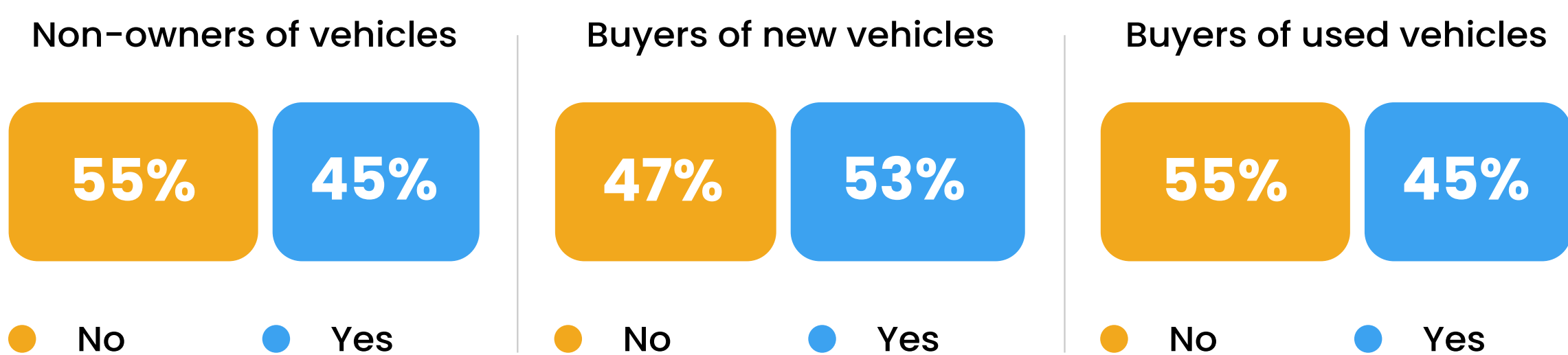
### Do you plan to go to college next year?



Potential buyers of new vehicles exhibited the most confidence in their insurance coverage but even here nearly half of new vehicle buyers believed their insurance coverage was inadequate. For used vehicle owners and non-vehicle owners it was more than half who believed they needed more insurance.



### Do you feel you are adequately insured?





What consumer data can you gather  
to drive business growth?



Consumer Identity



Survey Questions



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