Transportation in America Amid COVID-19: Shopping, Habits & Maintenance

May 2020
Transportation in America amid COVID-19

We know that COVID-19 has changed a lot of aspects of our daily lives. Things we used to take for granted look very different now, and they may look different still in the future.

The Harris Poll sought to understand how COVID-19 has changed our relationships with our automobiles. Not just how are we using them, but how are we maintaining them during the pandemic? And what will the ‘new normal’ look like?

The Harris Poll conducted this survey as part of a series of deep-dives of interest to those involved in the automotive sector, all of which are available via our website.

This component of research was conducted online from April 27-28 among a nationally representative sample of 1,031 U.S. adults.
The Harris Poll is aggressively delivering credible, trusted Covid perspectives that are shaping the narrative.
THE HARRIS POLL: COVID-19 IN THE U.S.

For context: American fear remains ever-present even as states begin to re-open

Which of the following is true for you?
“I fear I could die as a result of contracting coronavirus”

Wave 2 (3/14 - 3/15)
Cases: 3,600
Deaths: 0

Wave 3 (3/17 - 3/18)
Cases: 6,300
Deaths: 100

Wave 4 (3/21 - 3/23)
Cases: 43,781
Deaths: 550

Wave 5 (3/28 - 3/30)
Cases: 123,578
Deaths: 3,000

Wave 6 (4/3 - 4/5)
Cases: 336,673
Deaths: 16,700+

Wave 7 (4/11 - 4/13)
Cases: 640,291
Deaths: 31,000+

Wave 8 (4/18-4/20)
Cases: 827,038
Deaths: 45,000+

Wave 9 (4/25 - 4/27)
Cases: 1,000,000+
Deaths: 60,000+

Wave 10 (5/1 - 5/3)
Cases: 1,000,000+
Deaths: 60,000+

Q18 Which of the following is true for you? I fear I could die as a result of contracting coronavirus/ I do not fear that I could die as a result of contracting coronavirus

54% thought national fear was irrational

27% 28% 35% 43% 56% 47% 44% 51% 51%

74% now think national fear is sensible

Cases: 3,600
Deaths: 0

Cases: 6,300
Deaths: 100

Cases: 43,781
Deaths: 550

Cases: 123,578
Deaths: 3,000

Cases: 336,673
Deaths: 16,700+

Cases: 640,291
Deaths: 31,000+

Cases: 827,038
Deaths: 45,000+

Cases: 1,000,000+
Deaths: 60,000+

Cases: 1,000,000+
Deaths: 60,000+

Source: Harris Poll COVID19 Tracker Wave 2-9
BASE: GENERAL PUBLIC W2 (2050); W3 2019); W4 (2023) W5 (2016); W6 (1993); W7 (2013); W8 (2020); W9 (2050); W10 (2030)
But fear comes in waves: first health. Then jobs. And now, leaving the house. For business, safety is the new trust currency.

Trended Fear Curves During COVID19

- Fear ventilator shortage: 74%
- Fear global recession: 84%
- Fear losing their job: 56%
- Fear leaving home for essential errands: 80%
- Fear returning to public activity: 73%
- Fear of dying: 27%
- Fear of global recession: 79%
- Fear of losing their job: 55%
- Fear of leaving home for essential errands: 80%
- Fear of returning to public activity: 75%
- Fear of dying: 51%

Wave 2: 3/14 - 3/15
Wave 3: 3/17 - 3/18
Wave 4: 3/21 - 3/23
Wave 5: 3/28 - 3/30
Wave 6: 4/3 - 4/5
Wave 7: 4/11 - 4/13
Wave 8: 4/18-4/20
Wave 9: 4/25-4/27
Wave 10: 5/1 - 5/3
Importantly, Americans say economic impact will have a bigger effect personally than the virus itself

Which do you think will have a bigger effect on you and your family?

- Coronavirus/COVID-19 itself: 63%
- Other savings: 37%

As a result of Cv19, have you or your household been impacted financially in any of the following ways?

- Stopped or cut back other savings: 31%
- Stopped or cut back retirement savings: 32%
- Accumulated more debt than normal: 26%
- Expect a lower salary this year than last: 28%

36% expect a lower salary this year than last.

Source: Harris Poll COVID19 Tracker Wave 2-9
BASE: GENERAL PUBLIC W9 (2050); W10 (2039)
LI01 Which do you think will have a bigger effect on the life of you and your family?
EMP05 As a result of the current pandemic, have you or your household been impacted financially in any of the following ways?
Cv19 Recalibrations

The auto sector’s challenges are a swirling set of intersectional unknowns.

- **The EV Paradox**
  - Bloomberg
  - Electric Vehicles Buoyed by a Backlog and Fresh Air

- **Disruption Drives Driverless**
  - Digital Journal
  - Autonomous vehicles transport COVID-19 tests at Mayo Clinic

- **Moving Metal to Services**
  - Forbes
  - COVID-19 Is A Wake-Up Call For Automakers To Get Into The Mobility Service Business

- **Storydoing, not mere storytelling**
  - The Guardian
  - Can Detroit’s automakers solve America’s ventilator crisis?

- **Data Privacy Guardrails in Flux**
  - CNET
  - Apple, Google to terminate COVID-19 tracking tools once pandemic ends

- **Clean is the New Black**
  - Grist
  - Coronavirus pumps the brakes on the electric vehicle revolution

- **Online is Just Fine**
  - USA Today
  - Coronavirus has dealerships moving to online sales — and car buying may never be the same

- **The New Trust Currency: Safety**
  - Bloomberg
  - Technology
  - Ford Tests Buzzing Wristbands to Keep Workers at Safe Distances
Automotive Shopping Behaviors Amid COVID-19

This transportation survey was conducted online within the U.S. by The Harris Poll from April 27-28 among a nationally representative sample of 1,031 U.S. adults.
Auto shopping key findings

COVID-19 has significantly slowed car sales for now and changed driving behaviors. Purchase timing and vehicle consideration has shifted differently by generation.

- Nine out of ten new or used vehicle shoppers say that COVID-19 has impacted the timing of their vehicle purchase. However, not everyone plans to delay a vehicle purchase very long. Over one-half will only delay their purchase by 1-6 months or will purchase a vehicle sooner than they expected (54%).

- Purchase timing among those who were in-market differs markedly by generation. Gen Z and Millennial shoppers are more likely to purchase in the near term. Nearly two-in-five Gen Z (39%) and Millennial (35%) shoppers plan to delay their purchase 1 to 3 months.

- Vehicle shoppers who were considering a vehicle (new or used) before the pandemic are rethinking the type of vehicle they plan to purchase. At least a third of vehicle shoppers are now more likely to purchase a less expensive vehicle (35%) and close to two in five are more likely be shopping for a fuel-efficient vehicle (39%).

- Two in five vehicle shoppers are now more likely to be considering a new vehicle (39%) than they were before the pandemic. This is good news for manufacturers who have seen sales decline. Sales could be led by Millennials (50%) and Gen Xers (46%) who are showing the most interest in new vehicles.
Americans have delayed purchasing a vehicle due to cv19, but their timeframes vary. One-third have pushed out purchase by 6 months or more.

2020 Vehicle Purchase Intention Before COVID-19

Impact of COVID-19 Crisis On Vehicle Purchase Intention

- Plan to purchase vehicle sooner than planned: 14%
- Plan to delay vehicle purchase one month: 7%
- Plan to delay vehicle purchase 2-3 months: 20%
- Plan to delay vehicle purchase 4-6 months: 13%
- Plan to delay vehicle purchase more than 6 months: 26%
- No longer considering a vehicle: 10%
- No impact on vehicle purchase timing: 12%

Base: All Respondents, N=1031
Q1: At the beginning of 2020, had you intended to purchase or lease a vehicle sometime within the next 12 months?

Base: Intended to purchase/lease, N=434
Q2: What impact has the COVID-19 crisis had on your vehicle purchase/lease timing? Please select only one.
### Older vehicle shoppers are pushing out their vehicle purchase further than younger shoppers

**Impact of COVID-19 Crisis On Vehicle Purchase Intention**

<table>
<thead>
<tr>
<th>Impact of COVID-19 on Vehicle Purchase Timing</th>
<th>Age</th>
<th>Gender</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Gen Z</td>
<td>Millennials</td>
</tr>
<tr>
<td>Plan to purchase vehicle sooner than planned</td>
<td>14%</td>
<td></td>
</tr>
<tr>
<td>Plan to delay vehicle purchase one month</td>
<td>7%</td>
<td></td>
</tr>
<tr>
<td>Plan to delay vehicle purchase 2-3 months</td>
<td>20%</td>
<td></td>
</tr>
<tr>
<td>Plan to delay vehicle purchase 4-6 months</td>
<td>13%</td>
<td></td>
</tr>
<tr>
<td>Plan to delay vehicle purchase more than 6 months</td>
<td>26%</td>
<td></td>
</tr>
<tr>
<td>No longer considering a vehicle</td>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>No impact on vehicle purchase timing</td>
<td>12%</td>
<td></td>
</tr>
</tbody>
</table>

**Base:** Intended to purchase/lease, N=434

**Q2:** What impact has the COVID-19 crisis had on your vehicle purchase/lease timing? Please select only one.
Compared to earlier in the year, in-market shoppers are more likely to consider vehicles that are new, fuel efficient, and less expensive.

**Change in Purchase Consideration**

*Compared to earlier this year, I am now more likely to consider a...*

<table>
<thead>
<tr>
<th>Category</th>
<th>No change</th>
<th>More fuel efficient</th>
<th>Less expensive</th>
<th>Smaller vehicle</th>
<th>Used vehicle</th>
<th>Larger vehicle</th>
<th>More expensive</th>
<th>Less fuel efficient</th>
<th>New vehicle</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hybrid/Electric vehicle</td>
<td>24%</td>
<td>47%</td>
<td>30%</td>
<td>22%</td>
<td>23%</td>
<td>52%</td>
<td>26%</td>
<td>13%</td>
<td>39%</td>
</tr>
<tr>
<td>Less expensive vehicle</td>
<td>35%</td>
<td>52%</td>
<td>13%</td>
<td>22%</td>
<td>38%</td>
<td>52%</td>
<td>26%</td>
<td>13%</td>
<td>39%</td>
</tr>
<tr>
<td>More fuel efficient vehicle</td>
<td>39%</td>
<td>48%</td>
<td>13%</td>
<td>22%</td>
<td>38%</td>
<td>52%</td>
<td>26%</td>
<td>13%</td>
<td>39%</td>
</tr>
<tr>
<td>Smaller vehicle</td>
<td>22%</td>
<td>52%</td>
<td>26%</td>
<td>22%</td>
<td>38%</td>
<td>52%</td>
<td>26%</td>
<td>13%</td>
<td>39%</td>
</tr>
<tr>
<td>Used vehicle</td>
<td>23%</td>
<td>38%</td>
<td>39%</td>
<td>22%</td>
<td>38%</td>
<td>52%</td>
<td>26%</td>
<td>13%</td>
<td>39%</td>
</tr>
<tr>
<td>New vehicle</td>
<td>24%</td>
<td>47%</td>
<td>30%</td>
<td>22%</td>
<td>38%</td>
<td>52%</td>
<td>26%</td>
<td>13%</td>
<td>39%</td>
</tr>
</tbody>
</table>

**Base:** Still in market for vehicle, N=350

**Q3:** Compared to earlier this year, I am now more likely to consider a...
Millennials and Gen X are now more likely to consider new vehicles, while Gen Z are now more likely to consider used vehicles

Change in Purchase Consideration

*Compared to earlier this year, I am now more likely to consider a...*

<table>
<thead>
<tr>
<th>Purchase New</th>
<th>Purchase Used</th>
<th>No Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>Male</td>
<td>Male</td>
</tr>
<tr>
<td>Female</td>
<td>Female</td>
<td>Female</td>
</tr>
<tr>
<td>Gen Z</td>
<td>Gen Z</td>
<td>Gen Z</td>
</tr>
<tr>
<td>Millennials</td>
<td>Millennials</td>
<td>Millennials</td>
</tr>
<tr>
<td>Gen X</td>
<td>Gen X</td>
<td>Gen X</td>
</tr>
<tr>
<td>Boomers</td>
<td>Boomers</td>
<td>Boomers</td>
</tr>
<tr>
<td>HHI &lt;$50k</td>
<td>HHI &lt;$50k</td>
<td>HHI &lt;$50k</td>
</tr>
<tr>
<td>HHI $50-74k</td>
<td>HHI $50-74k</td>
<td>HHI $50-74k</td>
</tr>
<tr>
<td>HHI $75-99k</td>
<td>HHI $75-99k</td>
<td>HHI $75-99k</td>
</tr>
<tr>
<td>HHI $100k+</td>
<td>HHI $100k+</td>
<td>HHI $100k+</td>
</tr>
</tbody>
</table>

44% 42% 50% 41% 25% 28% 25% 17% 26% 30% 46% 28% 46% 34% 44% 56% 33% 41% 42% 39%

Base: Still in market for vehicle, N=350

Q3: Compared to earlier this year, I am now more likely to consider a...
Gen Z have shifted consideration to smaller vehicles since earlier this year, while two in five millennials are looking more closely at larger vehicles.

Change in Purchase Consideration
Compared to earlier this year, I am now more likely to consider a...

- Smaller Vehicle
  - Male: 22%
  - Female: 22%
  - Gen Z: 47%
  - Millennials: 20%
  - Gen X: 22%
  - Boomers: 15%
  - HHI <$50k: 31%
  - HHI $50-74k: 11%
  - HHI $75-99k: 28%
  - HHI $100k+: 19%

- Larger Vehicle
  - Male: 31%
  - Female: 19%
  - Gen Z: 29%
  - Millennials: 38%
  - Gen X: 26%
  - Boomers: 12%
  - HHI <$50k: 24%
  - HHI $50-74k: 28%
  - HHI $75-99k: 15%
  - HHI $100k+: 29%

- No Change
  - Male: 47%
  - Female: 59%
  - Gen Z: 24%
  - Millennials: 43%
  - Gen X: 52%
  - Boomers: 74%
  - HHI <$50k: 44%
  - HHI $50-74k: 61%
  - HHI $75-99k: 58%
  - HHI $100k+: 52%

Base: Still in market for vehicle, N=350
Q3: Compared to earlier this year, I am now more likely to consider a...
**HARRIS COVID-19 AUTO POLL**

**Hybrid/electric vehicle consideration increased among Gen X compared to earlier this year**

Change in Purchase Consideration

*Compared to earlier this year, I am now more likely to consider a...*

<table>
<thead>
<tr>
<th>Gas/Diesel</th>
<th>Male</th>
<th>Female</th>
<th>Gen Z</th>
<th>Millennials</th>
<th>Gen X</th>
<th>Boomers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>32%</td>
<td>27%</td>
<td>46%</td>
<td>32%</td>
<td>25%</td>
<td>29%</td>
</tr>
<tr>
<td>Female</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Hybrid/Electric</th>
<th>Male</th>
<th>Female</th>
<th>Gen Z</th>
<th>Millennials</th>
<th>Gen X</th>
<th>Boomers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>26%</td>
<td>21%</td>
<td>16%</td>
<td>28%</td>
<td>33%</td>
<td>10%</td>
</tr>
<tr>
<td>Female</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>No Change</th>
<th>Male</th>
<th>Female</th>
<th>Gen Z</th>
<th>Millennials</th>
<th>Gen X</th>
<th>Boomers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>43%</td>
<td>52%</td>
<td>37%</td>
<td>40%</td>
<td>42%</td>
<td>61%</td>
</tr>
<tr>
<td>Female</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Base:** Still in market for vehicle, N=350

**Q3:** Compared to earlier this year, I am now more likely to consider a...
Vehicle Usage and Maintenance Behaviors as a Result of COVID-19

This transportation survey was conducted online within the U.S. by The Harris Poll from April 27-28 among a nationally representative sample of 1,031 U.S. adults.
Vehicle usage & maintenance behaviors key findings

COVID-19 has not only limited driving of vehicles, but servicing of them as well. And the impacts will be felt even after things return to ‘normal’.

- Four-in-ten vehicle owners have delayed taking their vehicle in for service, with primary reasons being to adhere to social distancing and fear of the virus, not because of lack of driving. Younger vehicle owners are the most likely to have delayed vehicle service.

- Approximately one-in-ten vehicle owners took their vehicle in for service or repair during the past month. Most were able to take it to their typical facility. The majority who took their vehicle in for service during the pandemic felt the level of precautions taken by their facility was “just right”.

- Once the government provides information that the spread of the virus is flattening, the majority of vehicle owners (70%) say they will have their vehicle serviced within 3 months. Again, younger consumers are more cautious and say they will wait longer. Those who have delayed are looking for facilities to do several things to keep them safe.

- Half of vehicle owners anticipate cutting back on vehicle maintenance spending post COVID-19, especially the younger ones. This means that the impact will continue to be felt even after the economy re-opens.
Because of COVID-19, more than half are driving less often for personal reasons, and one-third are driving less for work-related reasons.

Driving Habits During COVID-19

<table>
<thead>
<tr>
<th>Driving for personal reasons</th>
<th>Driving for work-related reasons</th>
</tr>
</thead>
<tbody>
<tr>
<td>57%</td>
<td>33%</td>
</tr>
<tr>
<td>24%</td>
<td>25%</td>
</tr>
<tr>
<td>17%</td>
<td>12%</td>
</tr>
<tr>
<td>2%</td>
<td>30%</td>
</tr>
</tbody>
</table>

Base: Own or lease vehicle, N=824
Q5: How have the following changed as a result of COVID-19? Please select one answer for each.
Half of vehicle owners are taking more precautions inside and outside of their vehicle as a result of COVID-19

<table>
<thead>
<tr>
<th>Precautions Taken During COVID-19</th>
<th>Taking Precautions More Often</th>
</tr>
</thead>
<tbody>
<tr>
<td>Taking in-vehicle sanitary precautions</td>
<td>Gen Z</td>
</tr>
<tr>
<td>(e.g., Fewer people in vehicle, wiping down surfaces after usage, etc.)</td>
<td>57%</td>
</tr>
<tr>
<td>Taking out-of-vehicle sanitary precautions</td>
<td>62%</td>
</tr>
</tbody>
</table>

- More often
- No change
- Less often
- Not applicable

Base: Own or lease vehicle, N=824
Q5: How have the following changed as a result of COVID-19? Please select one answer for each.
Usage of mass transit/shared transportation has declined as a result of COVID-19, particularly among Gen Z

Transportation Usage During COVID-19

Using Mass Transit/Shared Transportation Less Often

<table>
<thead>
<tr>
<th>Age</th>
<th>Gender</th>
<th>Using Mass Transit/Shared Transportation Less Often</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gen Z</td>
<td>Male</td>
<td>47%</td>
</tr>
<tr>
<td>Millenials</td>
<td>Male</td>
<td>32%</td>
</tr>
<tr>
<td>Gen X</td>
<td>Male</td>
<td>28%</td>
</tr>
<tr>
<td>Boomers</td>
<td>Male</td>
<td>22%</td>
</tr>
<tr>
<td>Male</td>
<td>Female</td>
<td>33%</td>
</tr>
<tr>
<td>Female</td>
<td>Female</td>
<td>22%</td>
</tr>
</tbody>
</table>

Base: Own or lease vehicle, N=824

Q5: How have the following changed as a result of COVID-19? Please select one answer for each.
Four-in-ten vehicle owners have delayed taking their vehicle in for service or repairs, more-so the younger ones

**Delayed Vehicle Service/Repairs (% Yes)**

- **Total**: 39%
- **Age**
  - Gen Z: 60%
  - Millennials: 45%
  - Gen X: 42%
  - Boomers: 26%
- **Gender**
  - Male: 38%
  - Female: 40%

**Base**: Own or lease vehicle (N=836)

**Q7A** Has COVID-19 caused you to delay any expected vehicle service or repairs?
The vehicle service or repair most impacted is the oil change

Repairs/Services Delayed Because of COVID-19

- Oil change: 61%
- Tire rotation: 33%
- Minor repairs: 26%
- Brake services: 25%
- Wiper blade replacement: 19%
- Tire repair/new tire installation: 18%
- Major repairs: 17%
- Battery maintenance or replacement: 15%
- Transmission services: 13%
- Other: 3%

Base: Yes service delayed (N=325)
Q7B: What type of service or repairs have you delayed? Please select all that apply.
Social distancing and fear are motivating the decision to delay much more than the fact that the vehicle is being driven less

<table>
<thead>
<tr>
<th>Reasons for Service Or Repairs Delay</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>I am adhering to social distancing</td>
<td>50%</td>
</tr>
<tr>
<td>I don't feel comfortable given the COVID-19 virus</td>
<td>43%</td>
</tr>
<tr>
<td>It is not essential</td>
<td>34%</td>
</tr>
<tr>
<td>I am required to shelter in place</td>
<td>30%</td>
</tr>
<tr>
<td>I can't afford to spend the money now</td>
<td>29%</td>
</tr>
<tr>
<td>I am not sure if they are taking proper precautions</td>
<td>25%</td>
</tr>
<tr>
<td>I am not driving now, so it is not needed</td>
<td>24%</td>
</tr>
<tr>
<td>Other</td>
<td>3%</td>
</tr>
</tbody>
</table>

Higher Among Females  
Higher Among Females and younger

Base: Yes service delayed (N=325)  
Q7C  Why did you delay the service or repairs? Please select all that apply.
During COVID-19, one-in-ten vehicle owners took their vehicle in for service, mostly oil changes

- Within the past month: 13%
- 2-3 months ago: 35%
- 4-6 months ago: 30%
- More than 6 months ago: 19%
- Not sure: 3%

Service(s)/Repair(s) In Past Month:
- Oil change: 53%
- Tire rotation: 35%
- Warranty work: 20%
- Wiper blade replacement: 19%
- Minor repairs: 18%
- Tire repair/new tire installation: 16%
- Battery maintenance or replacement: 15%
- Major repairs: 11%
- Brake services: 7%
- Transmission services: 7%
- Other: 5%

Base: Own or lease vehicle (N=836)
Q6 When was the last time you took your vehicle to a service/repair facility (including dealerships, quick lubes, tire stores, garages, etc.)
Base: Past month service (N=105)
Q8A You indicated you took your vehicle to service/repair facility within the past month. What did you have done? Please select all that apply.
Among those who had service performed during the pandemic, most felt the level of precautions taken at the facility were “just right”

Precautions Taken At Facility Were

- Too Much: 4%
- Too Little: 17%
- Just Right: 79%

**Base:** Past month service (N=105)

**Q8B** Do you feel the social distancing and cleaning standards at the vehicle service/repair facility were…?
The overwhelming majority of those needing service on their vehicle were able to get it from their typical provider

Where Had Vehicle Serviced

- Typical Facility: 89%
- Different Facility: 11%

Base: Past month service (N=105)
Q8C Did you go to your typical vehicle service/repair facility or choose a different facility?
Once the spread flattens, the majority of consumers will take their vehicle in for service within 3 months; about the same as when they will go out to dinner.

Once Spread Is Flattening, How Long Before You…

<table>
<thead>
<tr>
<th></th>
<th>Go to the office</th>
<th>Go out to dinner</th>
<th>Go to a gym class</th>
<th>Take public transportation</th>
<th>Go to the movies</th>
<th>Greet with handshake</th>
<th>Stay in a hotel</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-30 days</td>
<td>52%</td>
<td>42%</td>
<td>31%</td>
<td>24%</td>
<td>22%</td>
<td>22%</td>
<td>17%</td>
</tr>
<tr>
<td>2-3 months</td>
<td>18%</td>
<td>22%</td>
<td>19%</td>
<td>19%</td>
<td>21%</td>
<td>16%</td>
<td>19%</td>
</tr>
<tr>
<td>4-6 months</td>
<td>14%</td>
<td>17%</td>
<td>15%</td>
<td>17%</td>
<td>21%</td>
<td>14%</td>
<td>21%</td>
</tr>
<tr>
<td>7-11 months</td>
<td>6%</td>
<td>9%</td>
<td>11%</td>
<td>10%</td>
<td>13%</td>
<td>10%</td>
<td>17%</td>
</tr>
<tr>
<td>A year or longer</td>
<td>10%</td>
<td>10%</td>
<td>23%</td>
<td>29%</td>
<td>23%</td>
<td>38%</td>
<td>26%</td>
</tr>
</tbody>
</table>

Base: Own or lease vehicle (N=836)
Q9A Once the government provides information that the spread of the virus is flattening, how long will it take you to feel comfortable taking your vehicle in for service/repairs?

Source: Harris Insights & Analytics COVID Tracker Wave 9, April 25-27, 2020
Younger vehicle owners will wait longer than older ones to get their vehicle serviced

**Once Spread Is Flattening, How Long Before You Take Your Vehicle In For Service**

<table>
<thead>
<tr>
<th>Timeframe</th>
<th>Gen Z</th>
<th>Millennials</th>
<th>Gen X</th>
<th>Boomers</th>
<th>Male</th>
<th>Female</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-30 days</td>
<td>29%</td>
<td>26%</td>
<td>38%</td>
<td>38%</td>
<td>31%</td>
<td>35%</td>
</tr>
<tr>
<td>2-3 months</td>
<td>41%</td>
<td>47%</td>
<td>34%</td>
<td>29%</td>
<td>42%</td>
<td>32%</td>
</tr>
<tr>
<td>4-6 months</td>
<td>17%</td>
<td>16%</td>
<td>17%</td>
<td>22%</td>
<td>15%</td>
<td>23%</td>
</tr>
<tr>
<td>7-11 months</td>
<td>4%</td>
<td>6%</td>
<td>5%</td>
<td>6%</td>
<td>5%</td>
<td>7%</td>
</tr>
<tr>
<td>A year or longer</td>
<td>8%</td>
<td>4%</td>
<td>6%</td>
<td>6%</td>
<td>7%</td>
<td>4%</td>
</tr>
</tbody>
</table>

**Base:** Own or lease vehicle (N=836)

**Q9A** Once the government provides information that the spread of the virus is flattening, how long will it take you to feel comfortable taking your vehicle in for service/repairs?
However, vehicle owners would like to see many precautions taken at the service and repair facilities to make them feel safe

<table>
<thead>
<tr>
<th>Precautions Necessary At Vehicle Service Facility</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mandatory masks for employees</td>
<td>57%</td>
</tr>
<tr>
<td>Hand sanitizer bottles at the facility</td>
<td>56%</td>
</tr>
<tr>
<td>Cleaning services guarantee hygienic wipe down of surfaces in the waiting area</td>
<td>54%</td>
</tr>
<tr>
<td>Cleaning services guarantee hygienic wipe down of surfaces in my vehicle</td>
<td>54%</td>
</tr>
<tr>
<td>Limiting number of customers</td>
<td>49%</td>
</tr>
<tr>
<td>Mandatory masks for customers</td>
<td>49%</td>
</tr>
<tr>
<td>Maximum capacity limits to ensure 6-feet distance between</td>
<td>54%</td>
</tr>
<tr>
<td>Touchless payment methods</td>
<td>39%</td>
</tr>
<tr>
<td>Required temperature tests for employees</td>
<td>32%</td>
</tr>
<tr>
<td>Ability to do all transactions online before going to facility</td>
<td>26%</td>
</tr>
<tr>
<td>Wait in my vehicle during service</td>
<td>25%</td>
</tr>
<tr>
<td>Required temperature tests for customers</td>
<td>24%</td>
</tr>
<tr>
<td>Mobile services (service comes to you)</td>
<td>19%</td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
</tr>
<tr>
<td>Nothing, I already feel safe</td>
<td>10%</td>
</tr>
<tr>
<td>N/A - there is nothing that will make me feel safe</td>
<td>4%</td>
</tr>
</tbody>
</table>

Higher Among Millennials
Higher among Gen X and Boomers

Base: Own or lease vehicle (N=836)
Q9B Which of the following changes at a vehicle service/repair facility will make you feel safe to take your vehicle in for service/maintenance? Please select all that apply.
## HARRIS COVID-19 AUTO POLL

As many as half of vehicle owners anticipate cutting back on spending post COVID-19, especially the younger ones

### Impact on Future Vehicle Maintenance Spending

<table>
<thead>
<tr>
<th>Impact on Future Vehicle Maintenance Spending</th>
<th>Age</th>
<th>Gender</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Gen Z</td>
<td>Millennials</td>
</tr>
<tr>
<td>Delaying recommended maintenance</td>
<td>46%</td>
<td>28%</td>
</tr>
<tr>
<td>Going longer between oil changes</td>
<td>30%</td>
<td>32%</td>
</tr>
<tr>
<td>Using less expensive service facilities</td>
<td>28%</td>
<td>19%</td>
</tr>
<tr>
<td>Using less expensive motor oil</td>
<td>25%</td>
<td>18%</td>
</tr>
<tr>
<td>Using a lower grade of gas</td>
<td>16%</td>
<td>15%</td>
</tr>
<tr>
<td>No impact on vehicle maintenance</td>
<td>17%</td>
<td>35%</td>
</tr>
<tr>
<td>Not sure</td>
<td>4%</td>
<td>8%</td>
</tr>
</tbody>
</table>

**Base:** Own or lease vehicle (N=836)

**Q10** In which, if any, of the following ways will your vehicle maintenance spending be impacted when social distancing/stay-at-home requirements are removed? Select all that apply.
For more information, please contact
Lisa Whalen
Managing Director, Automotive
lisa.whalen@harrisinsights.com
248-231-9592