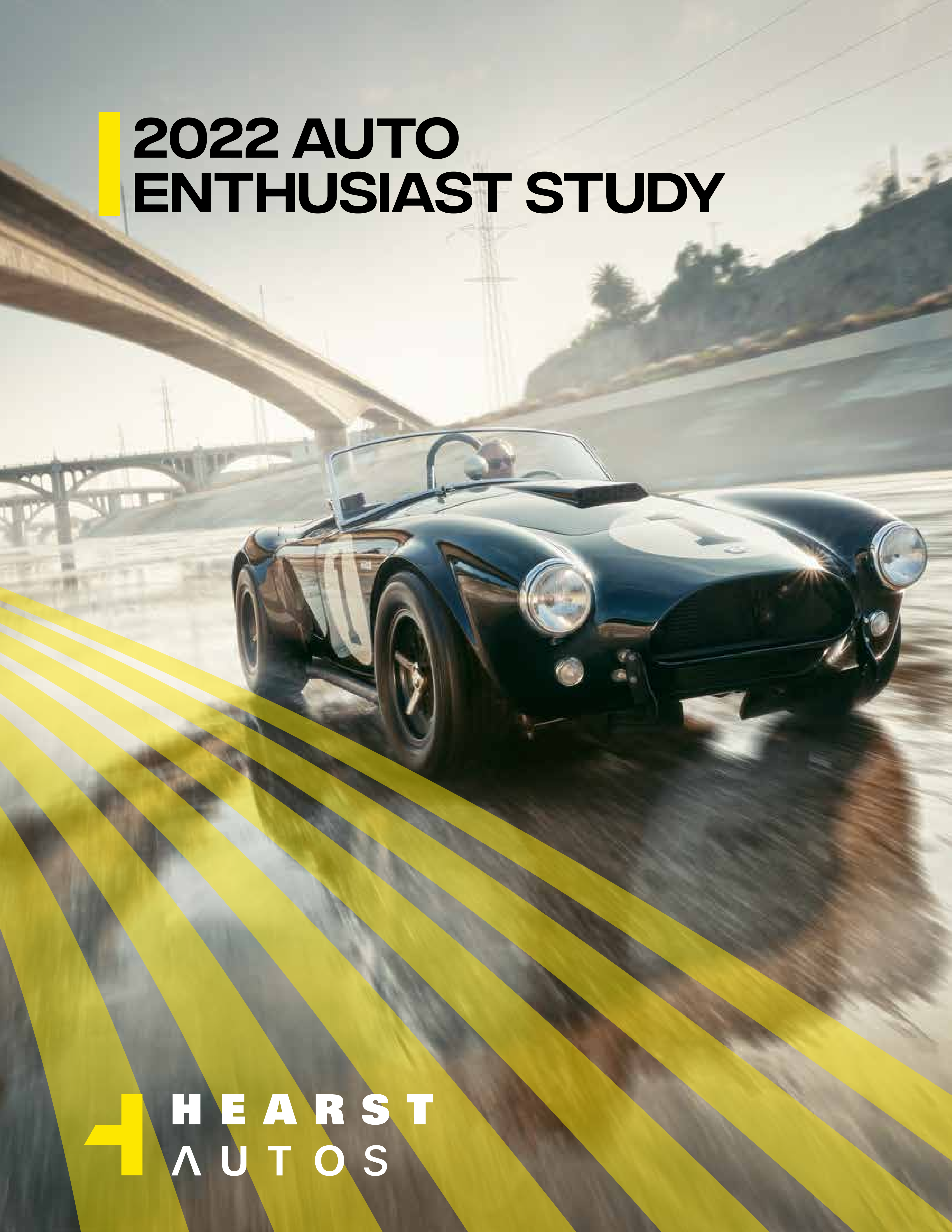
2022 AUTO ENTHUSIAST STUDY



HEARST AUTOS

overview

Hearst Autos represents some of the most trusted, authoritative editorial voices in the automotive and enthusiast space with brands like *Car and Driver, Road & Track,* and *Autoweek*. We tapped into these enthusiast communities and surveyed over 4,500 of the most captivated vehicle aficionados to hear about the ways they engage with all things auto. This study covers everything from the events and activities they follow, their purchase behavior, level of influence on friends and family, media consumption, and more.

CAR AND DRIVER ROAD & TRACK Autoweek

96%

consider themselves an **auto enthusiast**—someone who is interested in cars and spends their free time learning everything they can, and whose friends and family often turn to for advice.

Although enthusiasts are often thought of as hobbyists rather than consumers, they are simply an audience that automotive brands and publishers cannot ignore.

They own almost **50% MORE CARS** than the general population (2.75[1] on average vs. 1.88[2]), they advise an average of **4.6 PEOPLE** per year, and they oversee an average of **3.3 VEHICLE PURCHASES** by friends or family members.

They do their research, they're pragmatic in how they counsel others, and they love to talk cars. While their true population size is hard to nail down, their level of influence is undeniable.

Source:
[1]Hearst Autos, Auto Enthusiast Survey, February 2022
[2]U.S. Department of Transportation, via Statista, August 2021

what do we know about these enthusiasts?

They are affluent.

30% have a household income of **$150K+** and **48%** with **$100K+.**

They are educated.

73% have at least a 4-year college degree and **39%** have a postgraduate degree.

A majority are baby boomers.

56% are 65+ **35%** are of the Gen X group, while millennials and younger make up less than 10%.

They are a two-person household

76% are married and **85%** do not currently have children under 18 living at home.

They are suburbanites.

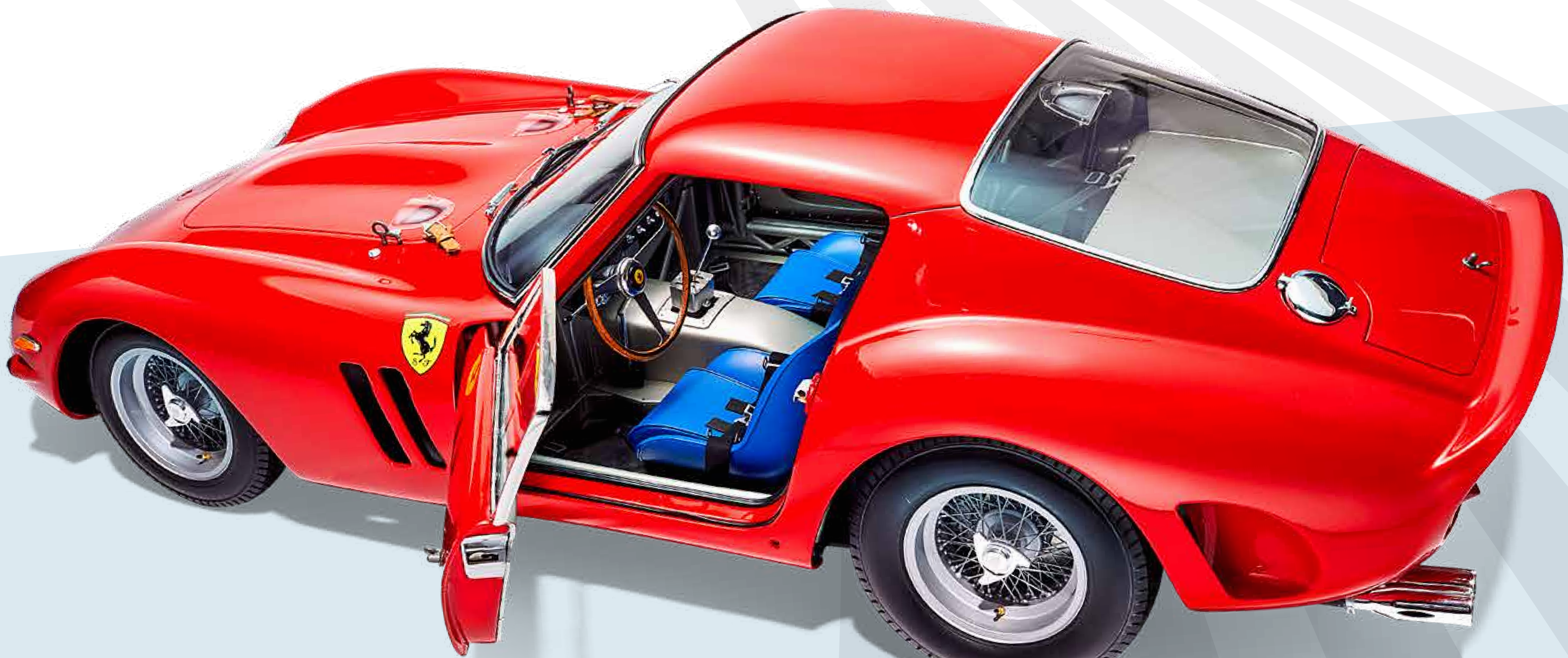
Most live in suburban areas **(64%)**, but almost an equal amount live in rural and urban areas.

They love driving manuals.

Half prefer manual cars **(51%)** and they're vocal about wanting more options across brands and body styles.

They love the open road.

Their greatest enjoyments are taking road trips for driving pleasure **(8/10)** and buying cars (7/10).



Their passion and influence extend beyond cars.

Roughly **2/3 ARE ENTHUSIASTS OR INFLUENCERS** in travel and sports categories, while another **1/3 ARE PASSIONATE** about electronics, music, art, or theater.

Other Categories In Which They Consider Themselves An Enthusiast Or Influencer

travel	sports	electronics	music or arts
38%	36%	30%	30%

home building or design	health and wellness	cooking or entertaining	outdoor living	gardening
25%	22%	21%	13%	13%

ENTHUSIAST ACTIVITIES & INTERESTS

what types of events do they attend?

Not only do they enjoy attending events around both classic and future cars, but they're also willing to pay for these experiences.

While event participation of any scale has been hampered by the pandemic over the past two years, **60% OF ENTHUSIASTS** still found their way to local car shows in the past six months, while another third opted to stay away from any in-person car events.

Among half of the respondents that provided an estimate of how much they spend on events and experiences, we found an average **$2,463 IN ANNUAL SPEND.**

Although a smaller percentage of enthusiasts enjoy attending car auctions in-person (40%), many still follow them via online channels: **Barrett Jackson, Mecum,** and **Bring a Trailer** are the top car auctions regularly followed.

their level of enjoyment

Weighted average in a scale of 1 to 5 ("I do not enjoy" to "I very much enjoy")

- auto shows **3.5**
- classic car shows **3.2**
- car collector events **2.9**
- motorsports (spectator) **2.8**
- racing track events **2.7**
- car auctions **2.1**

They continue to follow racing series at all levels of experience and across the globe.

Nearly **3/4 FOLLOW** or attend Formula 1, while IndyCar captures nearly **2/3 OF ENTHUSIASTS' ATTENTION,** if not attendance. Of the specific series or events, amatuer racing has the highest attendance, with the Indianapolis 500 following close behind.

organizations and racing series followed and/or attended by enthusiasts

	Follow	Attend	both
Formula 1	59%	1%	12%
IndyCar	47%	2%	14%
World Rally Championship	42%	1%	2%
IMSA SportsCar racing	41%	2%	13%
FIA World Endurance Championship	40%	1%	3%
NASCAR	36%	2%	11%
NHRA	27%	2%	8%
Motorcycle racing	22%	1%	6%
Amateur racing	20%	7%	13%

when it comes to being behind the wheel

In order of most enjoyment, enthusiasts prefer driving:

- On a racetrack
- On off-road trails or at an off-road park
- On/at a drag strip

43%

are a member of at least one auto club where they spend an average of $234 annually on club memberships.

For those that aren't currently club members, they cited that the COVID-19 pandemic, lack of time, or their location were the main reasons that have deterred them from joining.

The top 5 types of club memberships are as follows, with half being members of private clubs and one-third members of OEM-sponsored clubs:

+ Private clubs
+ OEM-sponsored clubs
+ Racetrack clubs
+ Publication-sponsored clubs
+ Marque (brand/model) owner goups (non-OEM sponsored)

Out of those who are members of automotive clubs, they would like clubs to offer more of the following:

+ **Events** / cars and coffee, driving, local, racing, touring, and track days/times
+ **Driving** / track driving, testing, instructions, and rallies
+ **Discounts** / on parts, publications, and more affordable events

CAR OWNERSHIP & CONSUMERSHIP

how often do they purchase?

They are super consumers who are in-market for either a primary or secondary vehicle every 3 - 5 years. Nine out of ten buy their cars over leasing or any other means, like subscriptions.

+ They own **2.75** vehicles on average, with 3–in–5 enthusiasts owning **2 OR 3 CARS**, and more than a quarter owning **4 OR MORE** vehicles.

91% buy their vehicles and among those:

- **59%** buy new
- **29%** buy used
- **13%** buy certified pre-owned

+ **LESS THAN 10%** of enthusiasts purchase any of their cars on a 1 – 2 year cycle.

how many cars do you own?

n=3,734

1	14%
2	34%
3	26%
4	12%
5 or more	14%

purchase cycle of all their cars

+ Instead, they are most frequently in-market to purchase a primary car every **3 — 5 YEARS**, secondary cars on a **5 YEAR+** cycle, and hobby vehicles on a **10 YEAR+** cycle.

	3 - 5 yrs	5+ yrs	10+ yrs
primary car	41%	36%	16%
secondary car	31%	40%	24%
hobby/ leisure car	20%	31%	42%

IN-MARKET

+ **ONE–IN–FIVE** are planning to buy within six months, and half are planning to purchase or lease within 1 – 2 years.
+ **ONE QUARTER** anticipate purchasing in 2 or more years.
+ **MORE THAN HALF** prefer to drive a manual transmission, but they want manufacturers to offer more options.
+ On average, they spend **$38.2K** on car purchases.

AGE OF VEHICLES

Daily Drivers:

+ Nearly **3/4** are at least 3 – 5 years old and **41%** over 5 years old.
+ For those with cars over 5 years, the average age was 12 years old.

Leisure Cars:

+ **HALF OWN** leisure cars 5 years or older, with an average age of 21 years.
+ Only **1–IN–5** do not own leisure cars.

ages of their vehicles

	less than 1 yr	1 - 2 yrs	3 - 5 yrs	over 5 yrs
daily driver	11%	19%	29%	41%
leisure car	6%	9%	14%	51%

what types of vehicles do they own?

+ While coupes and SUVs/CUVs are slightly more prefered, **1-IN-5 CAR ENTHUSIASTS STILL PREFER SEDANS** over other body styles.

TOP BODY STYLES IN THEIR GARAGES

+ For the same utility-based reasons as the average consumer, SUVs/CUVs lead the daily drivers at **32%**.
+ Unlike the general market, sedans are only lagging slightly behind at **27%**.
+ As expected from enthusiasts, coupes **(31%)** and convertibles **(28%)** make up the highest percentage of leisure cars in their garages.
+ A majority of enthusiasts **(88%)** have never owned or leased an alternative fuel vehicle—they still prefer gas.
+ Nearly **12%** have owned or currently own an alternative fuel vehicle, surpassing the share of hybrid **(6.4%)** and electric **(2.8%)** sales among the general population—roughly **9%** of the market.[1]

[1]Wards Intelligence, U.S. Light Vehicle Sales, January - December, 2021

daily driver

SUV or Crossover	32%
Sedan	27%
Pickup truck	11%
Hatchback	11%
Coupe	8%
Wagon	6%
Convertible or Targa	3%
Van	2%

leisure car

Coupe	31%
Convertible or Targa	28%
Sedan	15%
SUV or Crossover	14%
Hatchback	5%
Pickup truck	5%
Wagon	2%
Van	1%

the top brands in their garages.

While **PORSCHE** ranked **#1 FOR LEISURE CARS,** it was **#11 AMONG ENTHUSIASTS** as a primary car.

CHEVROLET jumped ahead as the **#2 BRAND FOR LEISURE** cars, primarily due to the Corvette.

SUBARU'S daily driver ownership was **181% HIGHER** than its leisure car ownership.

Similarly, **JEEP** had much higher ownership as a daily driver **(60%)** than as a leisure vehicle.

Daily Drivers

Ford	Honda	VW	Toyota	BMW
10%	8%	8%	7%	7%

Leisure Cars

Porsche	Chevrolet	Ford	BMW	Mazda
10%	9%	8%	6%	5%

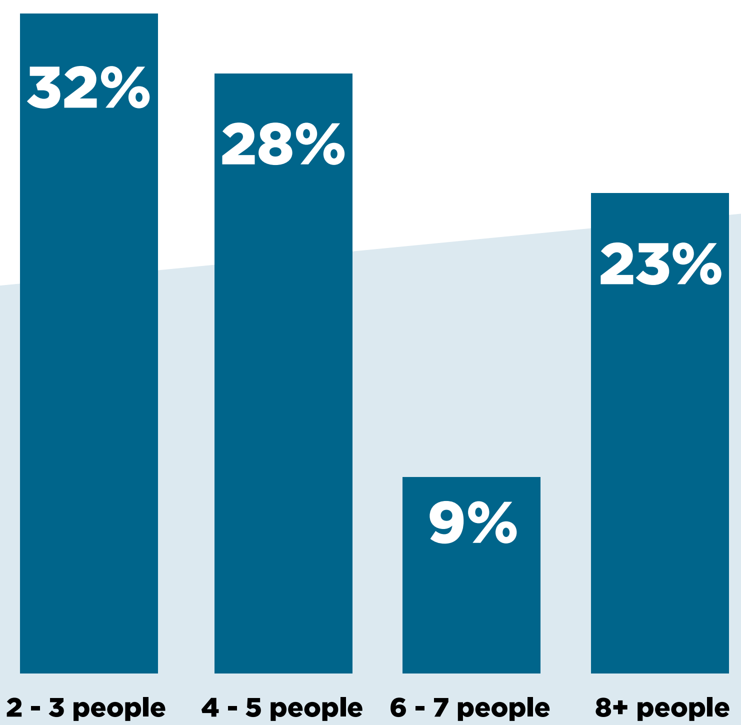
ENTHUSIASTS' LEVEL OF INFLUENCE

how often are they sought out for advice?

Not only do people seek out their opinions and advice—of which they have plenty to share—but they also help oversee the purchases of friends and family members.

They are experienced, well-researched, and informed consumers who love to share their thoughts. With the expansion of car technology, the number of high-quality brands on the market, and rising costs of cars, these folks are incredibly powerful in their level of advocacy and influence.

in the past year, how many people have asked for your opinion about a car or cars in general?



4.6

They advise an average of 4.6 people in a year, and 97% have been asked their opinion by at least one person.

2/3

have shared opinions with up to 5 people and another third advised 6 or more people.

Nearly

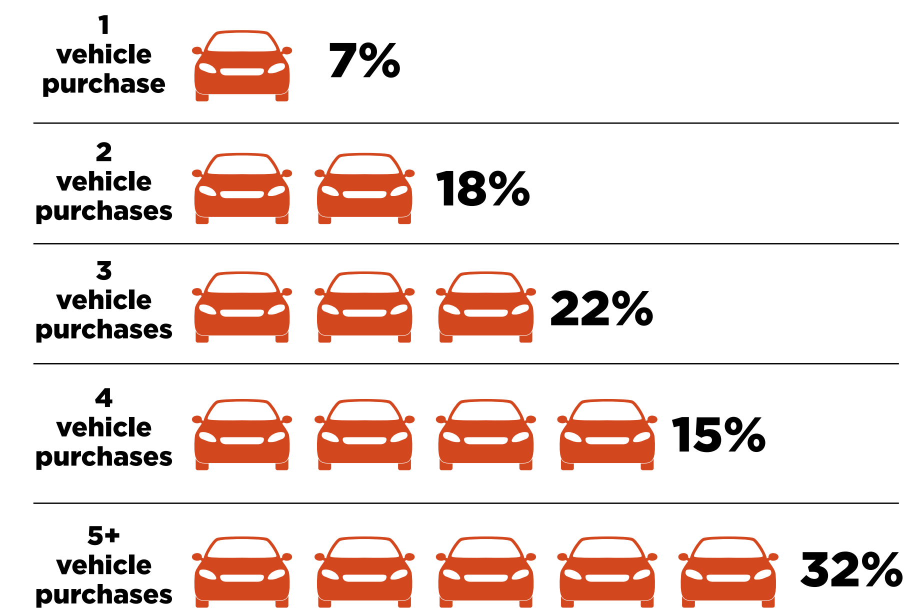
1-IN-4

indicated that 8 or more people have asked for their opinion about cars in the past year.

WHAT PEOPLE ARE ASKING THEM ABOUT

- **HALF** believe that they have been sought out more in recent years due to technology advancements in vehicles.
- Besides tech, some of the most common things that friends and family ask them about are:
  - Vehicle reliability and maintenance
  - Safety and specific features
  - Price/value
  - Performance
  - Vehicle comparisons

Thinking about the past five years, how many vehicle purchases within your family or friends have you overseen or counseled?



OVERSEEING & COUNSELING VEHICLE PURCHASES

1/3 have counseled **5+** purchases by friends or family. On average, enthusiasts helped oversee **3.3** purchases.

they are like a living shopping tool for many.

When it comes to the advice and recommendations they're giving, enthusiasts have an opportunity to demonstrate the breadth and diversity of their brand knowledge. By proposing vehicles that align with budgets, utility, desired features, and overall value to their friends and family—they're acting as a living, breathing, shopping tool for those around them.

THEY'RE BRAND AMBASSADORS FOR MANY

Honda, Kia, Mazda, Toyota, Ford, Subaru, Porsche, Hyundai, Tesla, and BMW are the **TOP 10 BRANDS** recommended by enthusiasts, but they are advocates of many and are masters at tailoring their recommendations to specific needs.

SOCIAL INFLUENCE

+ **1-IN-3** occasionally share automotive content or opinions via social channels, and Facebook is more common than Instagram.

  Facebook Users: average of 586 followers
  Instagram Users: average of 451 followers

+ Younger groups share more often (daily) than others and middle-aged groups were more likely to share weekly than all other age groups.

MEDIA CONSUMPTION

how do they get their auto news?

top 3 sources for new vehicle reveals

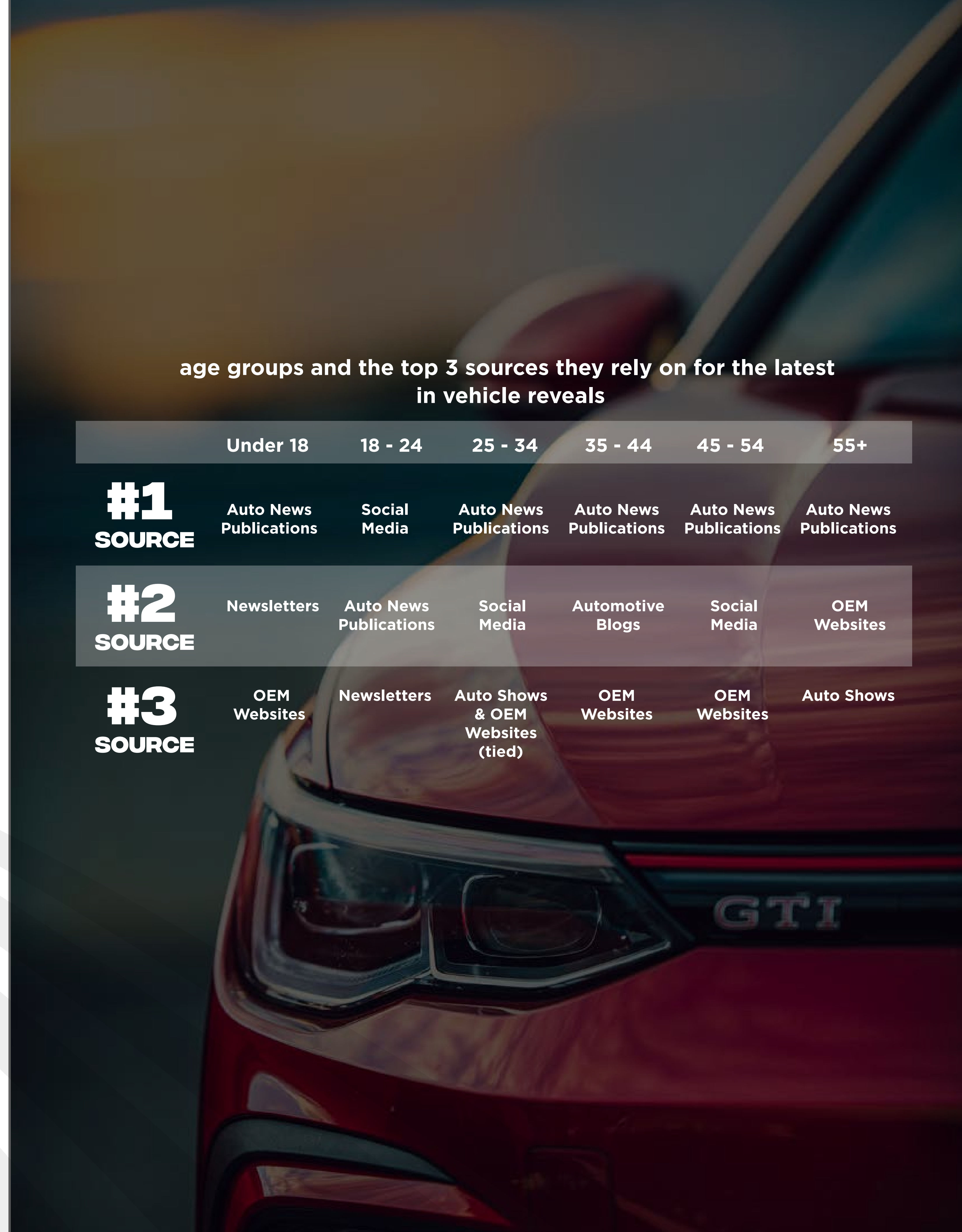
92% auto news publications

50% OEM websites

47% auto shows

KEEPING UP WITH NEW VEHICLES

- The #1 source enthusiasts rely on for the latest on new vehicles is **AUTO NEWS PUBLICATIONS**.
- Auto news publications were also the **#1 CHOICE FOR ALL AGE GROUPS** except 18 – 24 year olds, who placed Social Media ahead.
- Age contributed mostly to differences in the resources among younger demographics.
    - Younger enthusiasts follow **SOCIAL MEDIA AND AUTOMOTIVE NEWSLETTERS** more than older groups.
    - Although not among the top resources, enthusiasts up to 24 years old rely on **PODCASTS/RADIO SHOWS** more than any other age, followed next by those in the 35 – 44 age group.
    - **AUTOMOTIVE BLOGS** were most popular among those in the 35 – 54 age groups.
- **SOCIAL MEDIA** was most popular among 18 – 24 year olds, but was also strong for 25 – 54 age groups, and less relied upon among 55+.



age groups and the top 3 sources they rely on for the latest in vehicle reveals

	Under 18	18 - 24	25 - 34	35 - 44	45 - 54	55+
#1 SOURCE	Auto News Publications	Social Media	Auto News Publications	Auto News Publications	Auto News Publications	Auto News Publications
#2 SOURCE	Newsletters	Auto News Publications	Social Media	Automotive Blogs	Social Media	OEM Websites
#3 SOURCE	OEM Websites	Newsletters	Auto Shows & OEM Websites (tied)	OEM Websites	OEM Websites	Auto Shows

which publications and websites do they follow?

Enthusiasts subscribe to **1.97 AUTO MAGAZINES** on average with the highest percent subscribing to *Car and Driver, Road & Track, Motor Trend,* and *Consumer Reports.* A number of them mentioned *Autoweek* and *Automobile Magazine*, however they were removed from the magazine analysis since they're no longer print publications.

The same brands are among the top-visited auto websites or newsletters that enthusiasts subscribe to, but when it comes to social media, Top Gear has a stronger social following than the auto publications.

TOP AUTO MAGAZINES THEY SUBSCRIBE TO

Car and Driver
Road & Track
Motor Trend
Consumer Reports
Popular Mechanics

TOP AUTO SITES/APPS OR NEWSLETTERS THEY SUBSCRIBE TO

Car and Driver
Motor Trend
Road & Track
Autoweek
Hemmings Motor

TOP AUTO SOCIAL CHANNELS THEY FOLLOW

Top Gear
Motor Trend
Road & Track
Car and Driver
Autoweek

top 15 auto websites visited in the past 6 months

CarandDriver.com	76%
RoadandTrack.com	55%
Autotrader.com	54%
Edmunds.com	50%
BringaTrailer.com	50%
Motortrend.com	49%
Autoweek.com	47%
Kbb.com	46%
Cars.com	36%
Jalopnik.com	34%
CarGurus.com	33%
ConsumerReports.org	33%
NADAguides.com	23%
TrueCar.com	20%
JDPower.com	13%

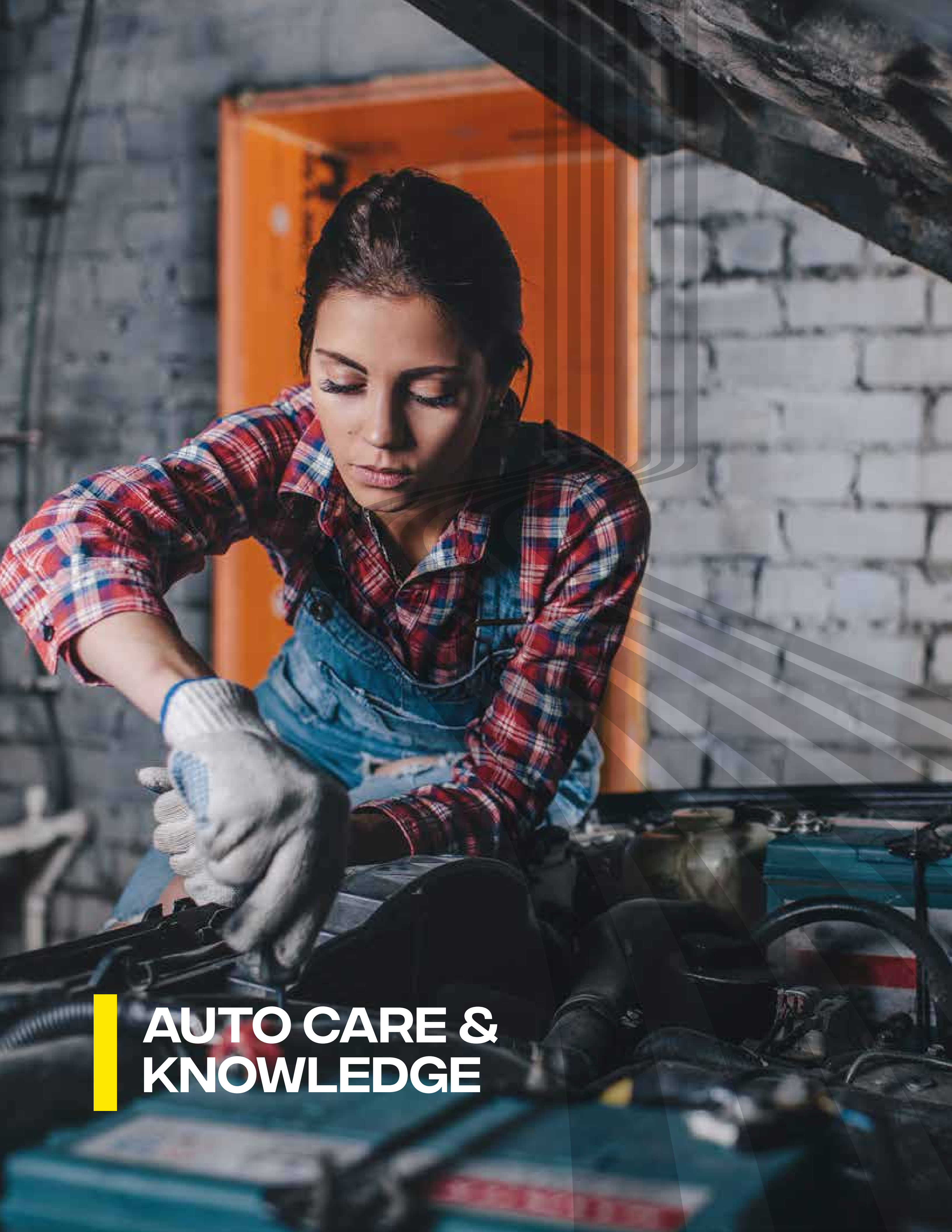
HOW THEY DEEM AN AUTO WEBSITE CREDIBLE

+ When asked how they verify that an auto website has credible information or opinions, enthusiasts used these most common words or phrases to describe their process:
  + Extensive comparisons across multiple websites
  + Cross-reference different resources
  + Look for consistency in test and research approaches
  + Consistency in technical information
  + Validate against their own experiences

ENTHUSIASTS ARE AVID VIDEO VIEWERS

They watch and follow a number of video channels, both for information and entertainment. These range from highly produced, professional videos, to DIY videos from up-and-coming influencers.

+ More than half regularly watch *Jay Leno's Garage*
+ One-third subscribe to or regularly watch Motor Trend, Top Gear and *Car and Driver* videos
+ Eighteen percent watch or follow other online influencers and 15% follow OEM video channels on YouTube



AUTO CARE & KNOWLEDGE

how hands on are they when it comes to car care?

More than two-thirds of enthusiasts have at least advanced knowledge around auto care or maintenance, and a third consider themselves proficient or having expert-level skills.

This level of knowledge is precisely what makes them valuable in advising others on reliability, auto maintenance or care considerations, and long-term value of a car—all of which were among the top reasons that people seek out their advice.

how would you describe your level of auto care capabilities?

- **36%** basic level ★
- **32%** advanced level ★★
- **23%** proficient level ★★★
- **9%** expert level ★★★★

PURCHASING HABITS AND BASIC MAINTENANCE THEY DO ON THEIR OWN CARS

+ Roughly **ONE-THIRD OF ENTHUSIASTS** purchase auto parts often or are always purchasing parts.
+ **NEARLY HALF** fall into the category of "sometimes purchase" and one-in-five consider auto parts a rare purchase.
+ Despite that, those that are purchasers have estimated that they spend an average of **$2,846 PER YEAR** in auto parts or maintenance.
+ Replacing wiper blades is the top type of maintenance enthusiasts do on their own cars, followed by inspecting/replacing fluids, air filters, and removing battery corrosion.

the type of maintenance they do on their own vehicles

- **85%** replacing wiper blades as needed
- **77%** inspecting all fluids
- **74%** replacing the air filter
- **72%** remove battery corrosion
- **51%** oil change
- **47%** Rotate tires and/or change tires
- **21%** other

key takeaways

+ Enthusiasts play a critical role in the decisioning of others and should be seen as a valuable resource to manufacturers.

+ They enjoy participating in events and want to learn and interact with brands, publications, and other car lovers.

+ Not only do they carry a wealth of historical knowledge, they want to continue learning more as technology advances.

+ The baby boomer generation has propelled the enthusiast space for many years—brands and publications need to tap into younger audiences to keep car culture alive.

+ Auto publications continue to be the most critical resource in fostering the passion and enthusiasm for cars of every generation.

METHODOLOGY
Hearst Autos interviewed respondents via online survey
In field from December 14, 2021 to January 4th, 2022
Sample: Recruitment from Hearst Autos enthusiast brands
Autoweek, Car and Driver, and *Road & Track* newsletter subscribers
Size: 4,510 respondents
- Autoweek: 804 respondents
- Car and Driver: 2,989 respondents
- Road & Track: 717 respondents