

Boomers Going the Distance: 2018 Consumer Insights on the Driving Experience Posted Questionnaire

Reading Notes:

Weighted data shown

Unless otherwise specified, unweighted bases are as follows:

- Total n=1511
- Millennials n=356
- Gen X n=369
- Boomers n=601

Unless otherwise noted, all numbers shown in %

* = <.5

- = 0

Base: all respondents

S01 [M]. Do you, personally, have any of the following?

	Total	Millennials	Gen X	Boomers
Car or vehicle (e.g. SUV, minivan, truck, etc.)	100	100	100	100
Gym membership	23	24	24	21
Retirement account (e.g. IRA, 401K)	61	46	67	69
Health insurance	88	81	88	91
Smartphone	84	94	91	80
Boat	7	3	7	9
Pet	57	59	62	55

Base: all respondents

S02 [S per statement] [PROMPT]. There has been a lot of talk recently about tech disruption, where new advances – things like automation or Wi-Fi/Smartphones – have rapidly changed consumer’s experiences with various products and services. To what extent do you feel that each of the following industries has been “disrupted” by new technology?

1. Automotive	Total	Millennials	Gen X	Boomers
A great deal/somewhat	62	60	57	68
A great deal	24	22	22	27
Somewhat	39	39	34	41
Not too much/not at all	37	40	43	32
Not too much	27	28	32	23
Not at all	11	12	11	9
Refused	*	-	1	*

2. Banking / Financial Services	Total	Millennials	Gen X	Boomers
A great deal/somewhat	71	71	69	72
A great deal	35	35	37	37
Somewhat	35	36	32	35
Not too much/not at all	29	29	30	28
Not too much	19	17	20	19
Not at all	10	12	10	8
Refused	*	-	1	*

3. Healthcare	Total	Millennials	Gen X	Boomers
A great deal/somewhat	57	57	51	60
A great deal	20	18	16	25
Somewhat	38	39	35	36
Not too much/not at all	43	43	49	40
Not too much	31	30	37	29
Not at all	12	13	12	11
Refused	*	-	1	*

4. Retail shopping	Total	Millennials	Gen X	Boomers
A great deal/somewhat	79	79	76	83
A great deal	51	49	50	53
Somewhat	28	29	25	29
Not too much/not at all	21	21	24	17
Not too much	12	14	14	9
Not at all	8	8	10	8
Refused	*	-	1	*

5. Media/Entertainment	Total	Millennials	Gen X	Boomers
A great deal/somewhat	76	75	76	79
A great deal	48	47	51	50
Somewhat	28	28	25	29
Not too much/not at all	24	25	24	21
Not too much	14	15	14	13
Not at all	9	10	10	8
Refused	*	-	1	*

6. Education	Total	Millennials	Gen X	Boomers
A great deal/somewhat	70	72	69	71
A great deal	31	29	31	33
Somewhat	39	43	39	38
Not too much/not at all	30	28	30	29
Not too much	20	19	21	21
Not at all	9	9	9	8
Refused	*	-	1	*

Base: all respondents

A01 [O] [PROMPT]. What is your best or most favorite memory related to the experience of driving?

See cross-tabulations.

	Total	Millennials	Gen X	Boomers
Driving a particular car	1	1	1	2
Driving at night	1	1	2	*
Driving with my windows down	2	3	2	1
Driving with music	3	5	4	2
Driving by myself	2	4	1	1
Road trips/ family road trips	31	24	33	34
Learning how to drive	7	6	7	7
Singing in the car	1	2	1	1
Driving a new car	3	3	2	3
Seeing new places/ Enjoying the view	3	3	3	3
Getting my first car	3	3	4	3

Getting my license	5	6	3	4
Independence/Freedom	7	8	7	8
No traffic/Open road	3	1	4	2
Racing/Speed	3	3	4	3
Driving for the first time	2	4	2	2
I just love to drive/ Just driving	2	2	1	2
Reaching my destination	1	1	1	1
Driving with family/friends	2	2	2	1
Others	10	8	11	11
None	9	9	7	10
DK/NA	3	5	3	2
Refused	3	3	3	3

Base: all respondents

A02 [M] [PROMPT]. When thinking in general about driving, which words from this list best describe how you feel about driving?

	Total	Millennials	Gen X	Boomers
Distracted	4	7	4	3
Independent	56	57	54	57
Anxious	16	19	17	14
Stressed	17	18	18	18
Safe	32	26	28	34
Competent	48	38	39	57
Impatient	17	20	19	16
Frustrated	16	15	19	15
Relaxed	39	40	35	40
Annoyed	19	22	19	18
Happy	35	35	32	34
Powerful	14	19	18	10
Cool	20	26	19	17
Refused	*	*	-	-

Base: all respondents

A03 [M] [PROMPT]. Please select the top two words that describe how you feel about driving.

	Total	Millennials	Gen X	Boomers
Distracted	2	3	1	*
Independent	41	40	41	43
Anxious	7	9	7	6
Stressed	9	10	9	8
Safe	14	11	13	15
Competent	33	25	25	41
Impatient	7	10	8	6
Frustrated	7	7	9	7
Relaxed	20	18	19	20
Annoyed	9	11	12	8
Happy	15	17	15	15
Powerful	5	6	8	3
Cool	4	7	3	3
Refused	-	-	-	-

Base: all respondents

A04 [S per statement] [PROMPT]. Thinking about your primary vehicle, please indicate how much you agree or disagree with each of the following statements.

My vehicle...

1. Is an extension of my personality	Total	Millennials	Gen X	Boomers
Strongly/somewhat agree	48	51	45	49
Strongly agree	10	12	7	9
Somewhat agree	39	39	38	40
Strongly/somewhat disagree	51	49	54	51
Somewhat disagree	33	32	36	33
Strongly disagree	18	17	18	17
Refused	*	-	1	*

2. Is the key to my independence	Total	Millennials	Gen X	Boomers
Strongly/somewhat agree	78	80	76	78
Strongly agree	31	31	27	34
Somewhat agree	47	49	49	44
Strongly/somewhat disagree	21	20	23	22
Somewhat disagree	16	15	17	16
Strongly disagree	5	5	6	6
Refused	*	-	1	*

3. Is just a mechanism to get from point A to point B	Total	Millennials	Gen X	Boomers
Strongly/somewhat agree	65	67	64	66
Strongly agree	25	24	23	27
Somewhat agree	40	42	41	39
Strongly/somewhat disagree	35	33	35	34
Somewhat disagree	22	23	24	22
Strongly disagree	12	11	12	12
Refused	*	-	1	-

4. Gives me a tremendous sense of freedom	Total	Millennials	Gen X	Boomers
Strongly/somewhat agree	84	85	82	85
Strongly agree	33	33	32	34
Somewhat agree	51	52	50	51
Strongly/somewhat disagree	15	15	17	15
Somewhat disagree	13	14	15	11
Strongly disagree	3	1	3	4
Refused	*	-	1	*

5. Allows me to see and experience new things	Total	Millennials	Gen X	Boomers
Strongly/somewhat agree	85	87	84	85
Strongly agree	30	31	31	29
Somewhat agree	55	56	53	56
Strongly/somewhat disagree	14	13	15	15
Somewhat disagree	11	10	12	11
Strongly disagree	3	3	3	4
Refused	*	-	1	*

6. Brings me happiness	Total	Millennials	Gen X	Boomers
Strongly/somewhat agree	77	80	73	77
Strongly agree	22	26	20	17
Somewhat agree	56	53	52	59
Strongly/somewhat disagree	22	20	27	23
Somewhat disagree	18	18	21	18
Strongly disagree	4	2	5	5
Refused	*	-	1	-

7. Is part of my self-image	Total	Millennials	Gen X	Boomers
Strongly/somewhat agree	46	47	41	48
Strongly agree	8	10	7	8
Somewhat agree	38	36	35	39
Strongly/somewhat disagree	54	53	58	52
Somewhat disagree	32	33	37	29
Strongly disagree	22	20	22	24
Refused	*	-	1	-

8. Is one of my most valued possessions	Total	Millennials	Gen X	Boomers
Strongly/somewhat agree	61	66	58	56
Strongly agree	17	21	15	15
Somewhat agree	44	46	43	41
Strongly/somewhat disagree	39	34	42	44
Somewhat disagree	27	24	29	28
Strongly disagree	12	9	13	16
Refused	*	-	1	-

9. Is worth splurging on	Total	Millennials	Gen X	Boomers
Strongly/somewhat agree	55	58	53	54
Strongly agree	11	12	11	10
Somewhat agree	44	46	42	44
Strongly/somewhat disagree	45	42	47	46
Somewhat disagree	33	28	35	34
Strongly disagree	13	13	12	12
Refused	*	-	1	-

10. Reflects my commitment and support of the environment	Total	Millennials	Gen X	Boomers
Strongly/somewhat agree	40	33	35	45
Strongly agree	7	5	5	9
Somewhat agree	34	28	30	37
Strongly/somewhat disagree	60	67	64	55
Somewhat disagree	42	47	43	39
Strongly disagree	18	20	21	16
Refused	*	-	1	-

11. Is a "money pit"	Total	Millennials	Gen X	Boomers
Strongly/somewhat agree	28	36	32	22
Strongly agree	5	8	6	3
Somewhat agree	23	28	26	19
Strongly/somewhat disagree	72	64	68	78
Somewhat disagree	38	40	34	37
Strongly disagree	34	24	34	41

Refused	*	-	1	-
---------	---	---	---	---

Base: all respondents

A05 [S] [PROMPT]. Which is the better place to sing your favorite songs?

	Total	Millennials	Gen X	Boomers
Your car	86	85	91	87
The shower	13	15	9	12
Refused	*	-	*	*

Base: all respondents

A06 [S] [PROMPT]. Which of the following roads best reflects you?

	Total	Millennials	Gen X	Boomers
Winding country road	46	36	48	51
Interstate highway	24	29	20	23
Tree lined avenue	23	24	24	21
Back alley	1	1	1	1
Parking lot	2	2	2	2
Race track	4	7	5	2
Refused	*	1	-	*

Base: all respondents

A07 [S]. Have you ever named a vehicle you owned or leased?

	Total	Millennials	Gen X	Boomers
Yes	38	43	40	34
No	62	57	60	66
Refused	*	*	-	*

Base: all respondents

B01 [S per statement]. Please indicate if you agree or disagree with each of the following statements about driving.

1. I do not trust other drivers on the road	Total	Millennials	Gen X	Boomers
Strongly/somewhat agree	86	88	86	85
Strongly agree	34	35	35	33
Somewhat agree	52	53	51	52
Strongly/somewhat disagree	13	11	14	14
Somewhat disagree	12	10	12	12
Strongly disagree	1	1	2	2
Refused	1	1	1	1

2. I enjoy the freedom driving allows me	Total	Millennials	Gen X	Boomers
Strongly/somewhat agree	93	94	92	94
Strongly agree	46	45	46	46
Somewhat agree	48	49	46	48
Strongly/somewhat disagree	6	5	7	6
Somewhat disagree	5	5	6	4
Strongly disagree	1	*	1	2
Refused	1	1	*	1

3. Driving is an opportunity for “me” time	Total	Millennials	Gen X	Boomers
Strongly/somewhat agree	78	83	79	75
Strongly agree	25	31	25	21
Somewhat agree	53	52	54	54
Strongly/somewhat disagree	21	16	20	25
Somewhat disagree	17	13	16	18
Strongly disagree	5	3	4	6
Refused	1	1	*	1

4. I often wish I could give people driving advice	Total	Millennials	Gen X	Boomers
Strongly/somewhat agree	60	59	58	61
Strongly agree	18	17	20	19
Somewhat agree	42	43	38	42
Strongly/somewhat disagree	39	39	42	38
Somewhat disagree	27	30	27	25
Strongly disagree	12	10	14	13
Refused	1	1	*	1

5. People would call me a “back seat driver”	Total	Millennials	Gen X	Boomers
Strongly/somewhat agree	34	33	35	34
Strongly agree	5	5	7	5
Somewhat agree	28	29	28	29
Strongly/somewhat disagree	65	66	65	64
Somewhat disagree	40	40	42	38
Strongly disagree	25	25	23	25
Refused	1	1	-	2

6. I get a lot of good thinking done while I am driving	Total	Millennials	Gen X	Boomers
Strongly/somewhat agree	77	81	81	75
Strongly agree	23	26	25	21
Somewhat agree	55	55	56	54
Strongly/somewhat disagree	22	18	19	24
Somewhat disagree	19	17	15	20
Strongly disagree	4	2	4	4
Refused	1	1	1	1

7. I’m a better driver than most people I know	Total	Millennials	Gen X	Boomers
Strongly/somewhat agree	80	80	82	80
Strongly agree	24	23	29	25
Somewhat agree	56	57	53	56
Strongly/somewhat disagree	19	18	18	18
Somewhat disagree	17	16	17	16
Strongly disagree	2	2	1	2
Refused	1	2	*	1

8. I have a great deal of knowledge and experience with vehicles	Total	Millennials	Gen X	Boomers
Strongly/somewhat agree	57	49	57	63
Strongly agree	17	16	18	19
Somewhat agree	40	33	39	44

Strongly/somewhat disagree	42	50	43	37
Somewhat disagree	32	38	32	28
Strongly disagree	10	12	10	9
Refused	1	1	*	1

Base: all respondents

B02 [S] [PROMPT]. Imagine you are at a party, would you rather reveal...?

a.	Total	Millennials	Gen X	Boomers
Your monthly car payment	28	36	35	22
Your monthly mortgage/rent payment	16	22	18	13
Does not apply	55	42	46	66

b.	Total	Millennials	Gen X	Boomers
Your highest credit card balance	9	16	8	6
Your biggest speeding fine	31	37	40	25
Does not apply	60	48	52	69

Base: all respondents

B03 [S]. Next, if you won the chance to design your ideal vehicle, would it be...?

	Total	Millennials	Gen X	Boomers
A standard car – I love the driving experience	73	66	70	78
A self-driving vehicle – I love the experience of being driven around	26	33	29	21
Refused	1	*	1	1

Base: all respondents

B04 [M]. Today's cars have a number of features. Please indicate if your primary vehicle has any of the following.

1. Heads up display (i.e. projection of things like speed and navigation onto the windshield)	Total	Millennials	Gen X	Boomers
Yes	8	11	7	6
No	89	84	89	92
Don't know	2	4	2	2
Refused	1	1	1	1

2. Self-parking also known as park assist	Total	Millennials	Gen X	Boomers
Yes	5	5	7	3
No	92	90	89	95
Don't know	2	4	1	1
Refused	1	1	2	1

3. Automatic emergency braking also known as forward collision warning	Total	Millennials	Gen X	Boomers
Yes	13	12	14	12
No	81	77	80	83
Don't know	6	10	6	4
Refused	1	1	*	1

4. Lane change alert or Lane keep assist	Total	Millennials	Gen X	Boomers
Yes	15	13	15	16
No	81	81	83	81
Don't know	2	3	2	1
Refused	1	2	*	2

5. Infotainment systems (e.g., rear-seat entertainment, HD radio, advanced speaker technology)	Total	Millennials	Gen X	Boomers
Yes	25	27	30	22
No	69	68	65	72
Don't know	4	4	3	6
Refused	1	1	1	1

6. Navigation or GPS	Total	Millennials	Gen X	Boomers
Yes	33	28	36	36
No	64	68	61	61
Don't know	2	2	2	2
Refused	1	2	2	1

7. Bluetooth connectivity	Total	Millennials	Gen X	Boomers
Yes	57	53	55	62
No	39	42	42	35
Don't know	3	4	3	3
Refused	1	1	*	1

8. Wi-Fi connectivity (Vehicle equipped with internet access and can share information with connected devices)	Total	Millennials	Gen X	Boomers
Yes	21	16	19	27
No	73	78	76	67
Don't know	5	5	4	5
Refused	1	1	1	1

9. Semi-autonomous or driver assist	Total	Millennials	Gen X	Boomers
Yes	7	7	8	7
No	86	85	86	88
Don't know	5	6	5	5
Refused	1	2	1	1

10. Back-up camera	Total	Millennials	Gen X	Boomers
Yes	42	35	43	46
No	55	60	55	53
Don't know	1	3	1	*
Refused	1	2	1	1

11. Blind spot awareness	Total	Millennials	Gen X	Boomers
Yes	20	17	22	20
No	76	78	76	76
Don't know	3	4	1	3
Refused	1	1	1	1

12. Voice control (send texts or make phone calls using voice commands)	Total	Millennials	Gen X	Boomers
Yes	39	37	42	41
No	56	57	56	55
Don't know	4	4	3	3
Refused	1	2	-	1

13. Telematics (i.e. monitors speed, hard breaking, etc. and sends information to a third party like an insurance company)	Total	Millennials	Gen X	Boomers
Yes	7	8	9	5
No	86	82	86	90
Don't know	6	8	5	5
Refused	1	2	*	1

Scripter, pipe in those not selected in B04 as "Yes"

Base: all respondents

B05 [M]. If you could choose any vehicle enhancement free of charge, which two would you choose from the below items.

	Total	Millennials	Gen X	Boomers
Heads up display (i.e. projection of things like speed and navigation onto the windshield)	12	15	14	9
Self-parking also known as park assist	14	16	10	15
Automatic emergency braking also known as forward collision warning	27	20	23	31
Lane change alert or Lane keep assist	14	10	12	16
Infotainment systems (e.g., rear-seat entertainment, HD radio, advanced speaker technology)	6	8	8	3
Navigation or GPS	20	17	19	22
Bluetooth connectivity	6	7	8	4
Wi-Fi connectivity (Vehicle equipped with internet access and can share information with connected devices)	14	16	19	10
Semi-autonomous or driver assist	7	11	8	5
Back-up camera	22	21	20	21
Blind spot awareness	30	24	26	37
Voice control (send texts or make phone calls using voice commands)	8	9	9	7
Telematics (i.e. monitors speed, hard breaking, etc. and sends information to a third party like an insurance company)	3	3	3	3
Refused	2	2	1	1

Base: all respondents

B06 [S]. How much do you agree or disagree with each of the following statements about auto features?

1. New in-vehicle technology and features make driving safer	Total	Millennials	Gen X	Boomers
Strongly/somewhat agree	77	75	76	77
Strongly agree	20	17	21	21
Somewhat agree	57	57	56	56

Strongly/somewhat disagree	22	24	23	22
Somewhat disagree	17	18	18	16
Strongly disagree	5	7	5	6
Refused	1	1	1	1

2. New in-vehicle technology and features makes driving more enjoyable	Total	Millennials	Gen X	Boomers
Strongly/somewhat agree	75	77	78	72
Strongly agree	15	14	19	14
Somewhat agree	60	64	59	58
Strongly/somewhat disagree	24	22	21	27
Somewhat disagree	17	18	14	20
Strongly disagree	6	4	8	7
Refused	1	1	1	1

3. I would pay more to have the latest features in my car	Total	Millennials	Gen X	Boomers
Strongly/somewhat agree	43	44	45	41
Strongly agree	7	8	8	5
Somewhat agree	37	36	37	36
Strongly/somewhat disagree	56	55	54	58
Somewhat disagree	35	37	34	35
Strongly disagree	21	18	21	23
Refused	1	1	1	1

4. I am usually among the first to try new auto features when they appear on the market	Total	Millennials	Gen X	Boomers
Strongly/somewhat agree	15	15	18	13
Strongly agree	2	3	3	2
Somewhat agree	12	12	14	11
Strongly/somewhat disagree	84	83	82	87
Somewhat disagree	39	42	40	37
Strongly disagree	45	41	42	50
Refused	1	2	1	*

Base: all respondents

B07 [M]. When buying or leasing a new vehicle, how do you shop and compare prices? *Select all that apply.*

	Total	Millennials	Gen X	Boomers
Use an app on my phone	14	19	19	7
Use an online comparison site (KBB, Edmunds, etc.)	51	56	54	51
Compare prices on dealership websites	57	60	62	55
Check the newspaper	12	8	10	15
Visit the dealerships in person	64	58	56	71
Other	6	4	4	7
Refused	1	1	*	1

Base: all respondents

C01 [S per statement]. Next are some statements people have made about vehicles and vehicle maintenance. For each, please indicate whether you believe it more of a myth or a reality.

1. You should change your vehicle's oil every 3,000 miles regardless of the make and model	Total	Millennials	Gen X	Boomers
Myth	55	44	55	60
Reality	34	40	34	30
Not sure	11	14	11	9
Refused	1	2	*	1

2. You should avoid revving the engine or accelerating before the engine is warmed up	Total	Millennials	Gen X	Boomers
Myth	18	17	21	17
Reality	60	54	58	67
Not sure	20	27	21	16
Refused	1	2	*	1

3. There is no benefit to using premium gas over regular gas unless your vehicle requires premium	Total	Millennials	Gen X	Boomers
Myth	18	19	22	16
Reality	65	54	65	72
Not sure	15	25	13	10
Refused	1	2	1	1

4. Too much air in your tires is worse than not enough air	Total	Millennials	Gen X	Boomers
Myth	16	15	17	16
Reality	53	46	55	58
Not sure	30	37	28	26
Refused	1	2	-	1

5. Reading the owner's manual is mainly for car enthusiasts	Total	Millennials	Gen X	Boomers
Myth	71	66	70	74
Reality	16	17	16	15
Not sure	13	16	14	10
Refused	1	1	1	1

6. A hot sunny day is the best time to wash your car	Total	Millennials	Gen X	Boomers
Myth	58	44	54	69
Reality	17	23	19	12
Not sure	23	31	26	18
Refused	1	2	*	1

7. The manufacturer's Suggested Vehicle Maintenance Schedule does not need to be followed to a tee	Total	Millennials	Gen X	Boomers
Myth	35	34	35	36
Reality	45	39	46	49
Not sure	19	25	18	14
Refused	1	2	1	*

Base: all respondents

D01 [S]. For each of the following pairs, please indicate which one you would least want to do...

a.	Total	Millennials	Gen X	Boomers
Take your car to the mechanic	43	49	45	41
Go to the dentist	56	51	55	58
Refused	*	1	*	*

b.	Total	Millennials	Gen X	Boomers
Take your car to the mechanic	43	49	45	39
Do your taxes	55	49	54	60
Refused	1	2	1	1

Base: all respondents

D02 [S]. What was the cost of your last auto repair, even if someone else paid the bill?

Just your best estimate is fine

	Total	Millennials	Gen X	Boomers
\$0-\$50	15	18	9	17
\$51-\$100	14	15	13	16
\$101-\$250	25	23	31	21
\$251-\$500	22	22	22	22
\$501-\$1000	14	15	15	12
\$1001-\$2000	5	4	6	7
More than \$2000	4	4	3	5
Refused	1	1	1	*
Mean	426.61	405.51	431.70	453.05

Base: all respondents

D03 [S per statement]. Please indicate how much you agree or disagree with each of the following statements about auto repairs.

1. I trust my mechanic not to rip me off	Total	Millennials	Gen X	Boomers
Strongly/somewhat agree	67	62	59	72
Strongly agree	21	17	19	21
Somewhat agree	46	45	40	50
Strongly/somewhat disagree	33	37	40	27
Somewhat disagree	22	25	25	21
Strongly disagree	10	12	15	7
Refused	1	1	1	1

2. Even after the warranty has expired, I still take my car to the dealership for maintenance	Total	Millennials	Gen X	Boomers
Strongly/somewhat agree	41	36	36	45
Strongly agree	14	9	12	18
Somewhat agree	26	27	23	27
Strongly/somewhat disagree	58	63	64	54
Somewhat disagree	23	26	24	21
Strongly disagree	36	37	40	33
Refused	1	2	1	1

3. There have been times when a surprise auto repair cost wrecked my monthly budget	Total	Millennials	Gen X	Boomers
Strongly/somewhat agree	59	63	64	56
Strongly agree	21	23	25	20
Somewhat agree	38	40	38	36
Strongly/somewhat disagree	39	36	35	43
Somewhat disagree	22	19	22	23
Strongly disagree	18	17	13	20
Refused	1	2	1	1

4. I budget / save for auto maintenance	Total	Millennials	Gen X	Boomers
Strongly/somewhat agree	39	42	38	38
Strongly agree	7	5	8	7
Somewhat agree	32	37	30	30
Strongly/somewhat disagree	60	56	61	61
Somewhat disagree	37	36	37	36
Strongly disagree	23	19	24	25
Refused	1	2	1	1

5. Auto repairs always seem to hit at the worst possible time	Total	Millennials	Gen X	Boomers
Strongly/somewhat agree	74	75	77	72
Strongly agree	26	31	31	22
Somewhat agree	48	44	46	49
Strongly/somewhat disagree	24	23	21	27
Somewhat disagree	18	17	17	20
Strongly disagree	6	6	4	7
Refused	2	2	2	1

6. I go out of my way to do as much of the mechanical work on my vehicle as I can	Total	Millennials	Gen X	Boomers
Strongly/somewhat agree	40	47	46	34
Strongly agree	15	15	17	13
Somewhat agree	25	32	28	20
Strongly/somewhat disagree	59	51	53	66
Somewhat disagree	23	27	19	23
Strongly disagree	35	24	34	42
Refused	1	2	2	1

7. I wish I knew more about how my vehicle worked	Total	Millennials	Gen X	Boomers
Strongly/somewhat agree	66	70	70	60
Strongly agree	18	22	20	15
Somewhat agree	48	49	50	45
Strongly/somewhat disagree	33	28	29	39
Somewhat disagree	24	21	20	28
Strongly disagree	9	7	8	11
Refused	1	2	1	1

Base: all respondents

D04 [S]. Which ONE of the following comes closer to your views?

	Total	Millennials	Gen X	Boomers

Vehicles of today are <u>too complicated</u> , requiring more maintenance than in the past	46	52	47	41
Vehicles of today have <u>improved design and technology</u> , requiring <u>less</u> maintenance than in the past	53	46	52	58
Refused	1	2	1	1

Base: all respondents

D05 [M]. When something goes wrong with your vehicle, how do you shop for and find auto repair services for you vehicle? *Select all that apply.*

	Total	Millennials	Gen X	Boomers
Use an App on my phone	3	4	5	1
Read reviews online	16	22	16	14
Go to a dealership	39	30	35	46
Get recommendations from family/friends	42	50	42	37
Go to a mechanic in my neighborhood/near my job	45	47	49	44
Check sites like Craigslist or Facebook Marketplace	3	6	3	1
Refused	1	2	1	1

Base: all respondents

D06 [S]. When choosing a mechanic, which is more important to you?

	Total	Millennials	Gen X	Boomers
Their reputation	79	71	76	82
The prices they charge	21	27	23	17
Refused	1	2	1	*

Base: all respondents

D07 [S]. Do you believe a mechanic has ever ripped you off?

	Total	Millennials	Gen X	Boomers
Yes	66	59	73	69
No	33	40	26	30
Refused	1	1	1	1

Base: all respondents

D08 [S]. Do you have a trusted mechanic for when you begin to have issues with your vehicle?

	Total	Millennials	Gen X	Boomers
Yes	71	67	68	75
No	28	31	31	25
Refused	1	2	1	*

Base: all respondents

D09 [S]. Next, have you ever used a ride-sharing service, such as Lyft or Uber? By ride sharing, we mean requesting a ride via an app from individuals using their own vehicle instead of a standard taxicab.

	Total	Millennials	Gen X	Boomers
Yes	28	38	35	20
No	71	61	64	79
Refused	1	1	*	*

Base: ask if D07=2, have never used a ride-sharing service, such as Lyft or Uber

D10 [S]. Even if you have not yet tried out a ride-sharing service, such as Lyft or Uber, how likely would you be to consider trying ride-sharing if it was available to you?

	Total	Millennials	Gen X	Boomers
Base: Have never used a ride-sharing service, such as Lyft or Urber	1091	213	234	476
Very/somewhat likely	32	36	33	33
Very likely	7	8	6	8
Somewhat likely	25	29	28	24
Not too / Not at all likely	68	64	66	67
Not too likely	35	34	34	35
Not at all likely	33	30	32	32
Refused	*	-	*	*

Base: all respondents

D11 [S]. How much do you agree or disagree with the following statements about auto trends?

1. Ride-sharing is more than a passing fad – it’s a trend that is here to stay	Total	Millennials	Gen X	Boomers
Strongly/somewhat agree	75	73	71	78
Strongly agree	20	19	23	21
Somewhat agree	54	54	47	57
Strongly/somewhat disagree	24	25	28	21
Somewhat disagree	19	19	24	15
Strongly disagree	5	6	4	5
Refused	1	2	1	1

2. I'm extremely curious about newer types of vehicles like gas/electric, hybrids or all electric vehicles	Total	Millennials	Gen X	Boomers
Strongly/somewhat agree	54	59	56	50
Strongly agree	13	15	15	11
Somewhat agree	41	44	41	38
Strongly/somewhat disagree	45	40	44	49
Somewhat disagree	28	27	28	30
Strongly disagree	16	12	16	19
Refused	1	2	1	2

3. I love the idea of vehicles driving themselves so I can do other things	Total	Millennials	Gen X	Boomers
Strongly/somewhat agree	34	42	38	28
Strongly agree	9	15	11	6
Somewhat agree	24	27	27	21
Strongly/somewhat disagree	65	56	61	72
Somewhat disagree	31	29	31	33
Strongly disagree	34	28	30	40
Refused	1	2	1	*

4. I like to keep up with the latest auto trends	Total	Millennials	Gen X	Boomers
Strongly/somewhat agree	34	31	34	35
Strongly agree	5	6	4	6
Somewhat agree	28	25	30	29

Strongly/somewhat disagree	65	67	64	64
Somewhat disagree	40	41	39	39
Strongly disagree	25	25	25	25
Refused	1	2	2	1

Base: all respondents

E01 [S]. When was your most recent vehicle purchase or lease?

	Total	Millennials	Gen X	Boomers
Under a year ago	18	22	19	15
1-2 years ago	27	30	29	25
3-5 years ago	28	30	27	29
6-10 years ago	17	13	18	19
More than 10 years ago	9	4	7	12
Refused	1	1	1	-

Base: all respondents

E02 [S]. What type of vehicle is your primary vehicle?

	Total	Millennials	Gen X	Boomers
Compact car	11	15	9	12
Sedan	30	35	27	25
Crossover	5	4	5	5
SUV	28	21	30	30
Hatchback	4	4	4	3
Minivan or van	6	6	8	5
Truck	11	8	11	13
Sports car	4	5	4	3
Convertible	1	*	1	1
Wagon	1	1	1	2
Refused	*	1	*	-

Base: all respondents

E03 [S]. And in an ideal world, which ONE of the following vehicles would you most want to own or lease?

	Total	Millennials	Gen X	Boomers
Compact car	5	6	5	4
Sedan	13	13	11	11
Crossover	7	6	8	6
SUV	32	30	30	35
Hatchback	2	3	1	2
Minivan or van	4	4	4	4
Truck	16	15	19	17
Sports car	13	17	13	12
Convertible	5	4	7	6
Wagon	1	1	1	1
Refused	1	1	1	*

Base: all respondents

E04 [S]. How did you finance your current vehicle?

	Total	Millennials	Gen X	Boomers
Paid cash	34	31	30	38
Lease	7	8	7	6

Finance/loan	53	49	60	54
Gifted/Inherited	5	11	3	2
Refused	1	1	1	-

Base: all respondents

E05 [S]. How much do you currently spend on your vehicle each month? Please include the cost of gas, maintenance, and lease or loan payments.

	Total	Millennials	Gen X	Boomers
\$100 a month or less	32	28	23	38
\$101 - \$200/month	24	25	25	21
\$201 - \$400/month	21	26	22	19
\$401 - \$600/month	15	15	19	13
\$601 - \$800/month	6	4	9	6
\$801 - \$1000/month	1	1	2	2
\$1001+ /month	*	1	*	*
Refused	1	1	1	*
Mean	266.71	265.22	303.51	253.85

Base: all respondents

E06 [Q]. How many vehicles have you owned or leased in your life?

	Total	Millennials	Gen X	Boomers
1-5	48	86	55	21
6-10	34	12	32	51
11-25	15	1	12	24
26+	2	1	1	3
Refused	1	1	1	1
Mean	7.21	3.59	6.61	9.66

Base: all respondents

E07 [Q]. How many MORE vehicles do you expect to lease or purchase in your life?

	Total	Millennials	Gen X	Boomers
0	6	2	4	8
1	15	8	10	18
2	24	17	16	36
3	14	15	18	14
4	8	10	12	6
5	13	17	18	8
6+	17	29	22	9
Refused	2	2	1	2
Mean	3.80	5.04	4.69	2.74

Base: IF E07 DOES NOT = 0

E08 [S]. When do you think you will purchase or lease your next vehicle?

	Total	Millennials	Gen X	Boomers
Base: Expect to lease or purchase more vehicles	1390	341	355	548
Less than a year from now	10	11	9	9
1-2 years from now	30	31	31	28

3-5 years from now	42	41	40	44
6-10 years from now	15	15	15	15
More than 10 years from now	3	3	5	3
Refused	*	-	*	*
Mean	3.75	3.67	3.88	3.85

Base: all respondents

E09 [Q]. How many of each of the following are in your household?

Vehicles	Total	Millennials	Gen X	Boomers
1	24	23	21	23
2	44	43	46	44
3	18	14	19	20
4+	13	18	13	12
Refused	1	2	1	1
Mean	2.28	2.38	2.34	2.26

Drivers	Total	Millennials	Gen X	Boomers
1	19	18	15	22
2	59	52	59	63
3	13	14	17	10
4+	7	13	7	4
Refused	2	2	2	1
Mean	2.10	2.28	2.18	1.97

Base: all respondents

E10 [S]. Aside from cost, what were your top two priorities when you purchased or leased your last vehicle?

	Total	Millennials	Gen X	Boomers
Suitable for families	28	34	37	18
Fuel efficiency	47	51	44	47
Fun to drive	16	16	18	15
Advanced technology	10	10	11	9
Stylish exterior	14	15	14	14
Comfortable interior	32	23	28	40
Safety ratings/construction	37	34	33	41
Refused	1	2	1	2

Base: all respondents

E11 [Q]. On average, how many hours per week do you spend driving?

Hours	Total	Millennials	Gen X	Boomers
0	*	-	1	*
1-4	29	31	25	30
5-10	46	46	48	44
11+	23	21	26	24
Refused	1	3	1	1
Mean	9.01	9.01	9.65	9.03

Base: all respondents

E12 [Q]. At what age do you think you will stop driving?

	Total	Millennials	Gen X	Boomers
60-75	12	14	15	10
76+	24	18	17	31
Never, I plan to drive the rest of my life	62	65	66	57
Refused	2	3	1	2
Mean	80.01	78.26	77.66	81.68

END OF QUESTIONNAIRE