



A New Route to the Dealership: How Buyers Shop and Dealers Sell in Today's Automotive Market

Key Facts + Findings from the 2026 Urban Science Harris Poll Study



URBAN SCIENCE®



The Harris Poll
Harris Insights & Analytics LLC, A Stagwell Company

A New Route to the Dealership: How Buyers Shop and Dealers Sell in Today's Automotive Market

Key Findings From the 2026 Urban Science Harris Poll Study

The shopping process is becoming more competitive for dealers, as economic pressures push consumers to prioritize price and value. Auto buyers are increasingly willing to cross-shop brands, fracturing brand loyalty and intensifying the risk of defection (lost sales) for dealers. Compared to last year, 44% of buyers say they spend more time researching before contacting a dealership. Nearly a third of buyers (31%) also report a heightened focus on price and value over brand loyalty, and 25% say they are more likely to purchase a car entirely online today than they were a year ago.

For the sixth consecutive year, Urban Science®, in collaboration with The Harris Poll, surveyed 3,012 U.S. auto buyers who currently own or lease a vehicle or plan to do so in the next 12 months, along with 252 U.S. original equipment manufacturer (OEM) automotive dealers. The results point to a buyer journey that is becoming increasingly digital and fragmented. Auto buyers are leaning on online sources for their research, particularly dealership websites and search engines. Dealers and the agencies that represent them, for their part, are investing heavily in digital media. However, with that investment comes a growing slate of data and tools for dealers to navigate, adding to the complexity they were already managing.

By some measures, the pressure on dealers has eased over the last 12 months. Many of the cost-related worries that dominated buyer sentiment in last year's study have softened slightly, although they remain top of mind. When buyers were asked about their biggest concerns with leasing or buying a vehicle, affordability still led at 58% but had dropped six percentage points year over year. Similarly, buyer concern about the cost of vehicle insurance fell five percentage points to 47%.

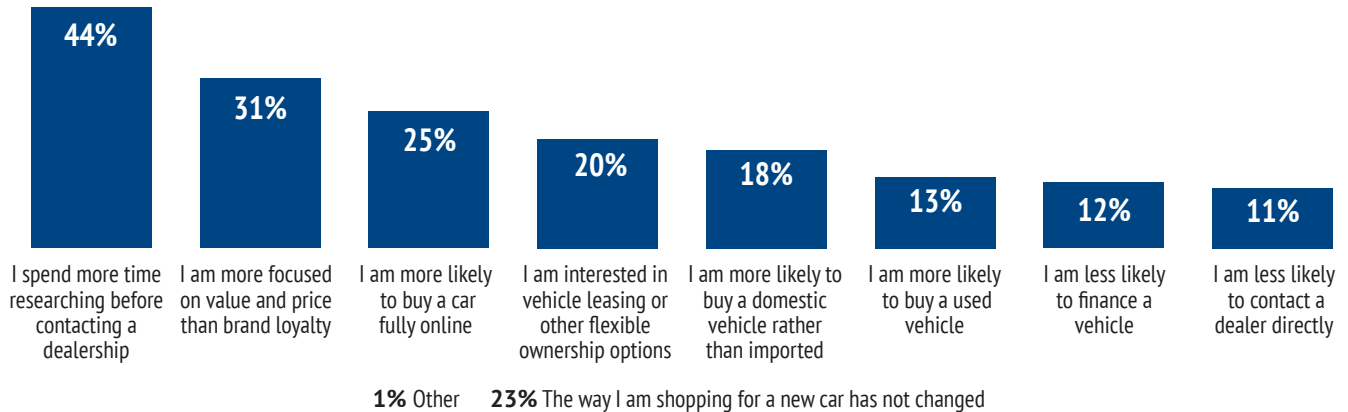
Dealers, on the other hand, are growing more worried about economic and financial constraints, bringing dealer and auto-buyer concerns into closer convergence. Both groups are focused on whether buyers can successfully navigate affordability and financing hurdles. Just over half of dealers (51%) cited economic factors as their top concern, up 11 percentage points from last year. Dealer concern around the cost to service vehicles also increased by 11 percentage points to 39%. The growing buyer-dealer alignment around affordability is already influencing behavior across the funnel. Consumers are researching, cross-shopping and submitting leads at higher rates. Meanwhile, dealers are placing greater emphasis on lead quality and follow-up, recognizing each opportunity to engage an auto buyer carries more weight in a cost-sensitive environment.

In good news for dealers, confidence in both their role and the traditional car dealership experience is rising. This year, 63% of dealers strongly agreed the traditional car dealership is optimized for the future. While this figure came in at 42% among auto buyers, it represents a five-percentage-point increase from last year. In addition, 74% of dealers said they believed dealers play an essential role in the new-car buying journey (up from 55% last year), as did 47% of auto buyers (up from 44% last year).

While rising confidence in the dealership model represents a positive trend for dealers, these metrics still reveal a significant gap between buyer and dealer sentiment. Can dealers bridge the divide? As this report will show, dealers now have more tools and data at their disposal than ever before. **The key is knowing how to deploy those capabilities and insights to deliver a best-in-class customer experience.**

CHANGES IN THE WAYS AUTO BUYERS SHOP FOR VEHICLES

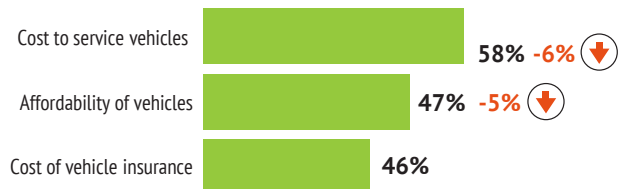
Changes in the Ways AUTO BUYERS Shop for Vehicles Over the Past Year



TOP PURCHASING/LEASING CONCERNS AMONG AUTO BUYERS; BIGGEST SELLING CONCERNS AMONG DEALERS



AUTO-BUYERS' Biggest Vehicle Purchasing/Leasing Concerns Today

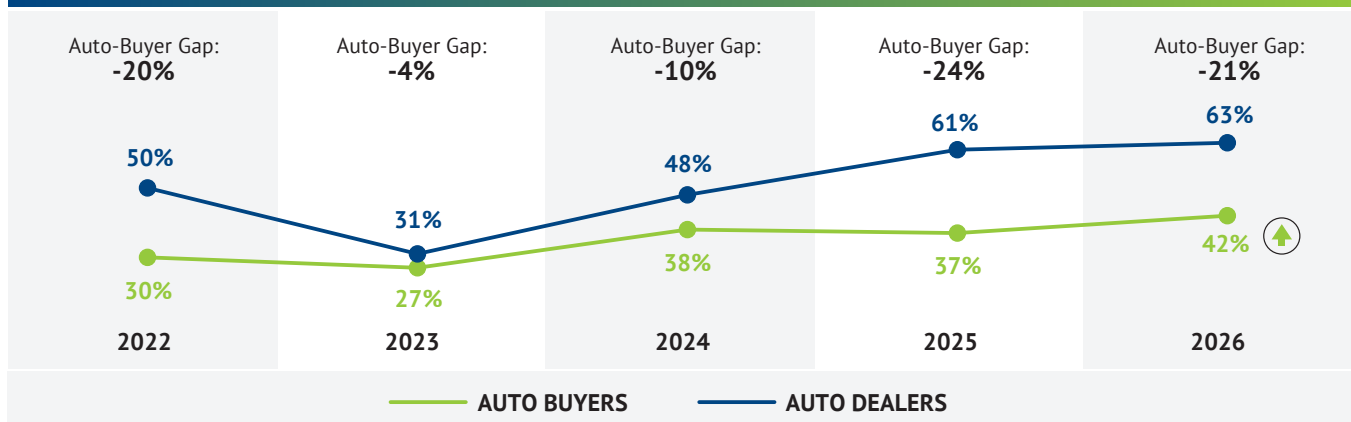


DEALERS' Biggest Vehicle Selling Concerns Today

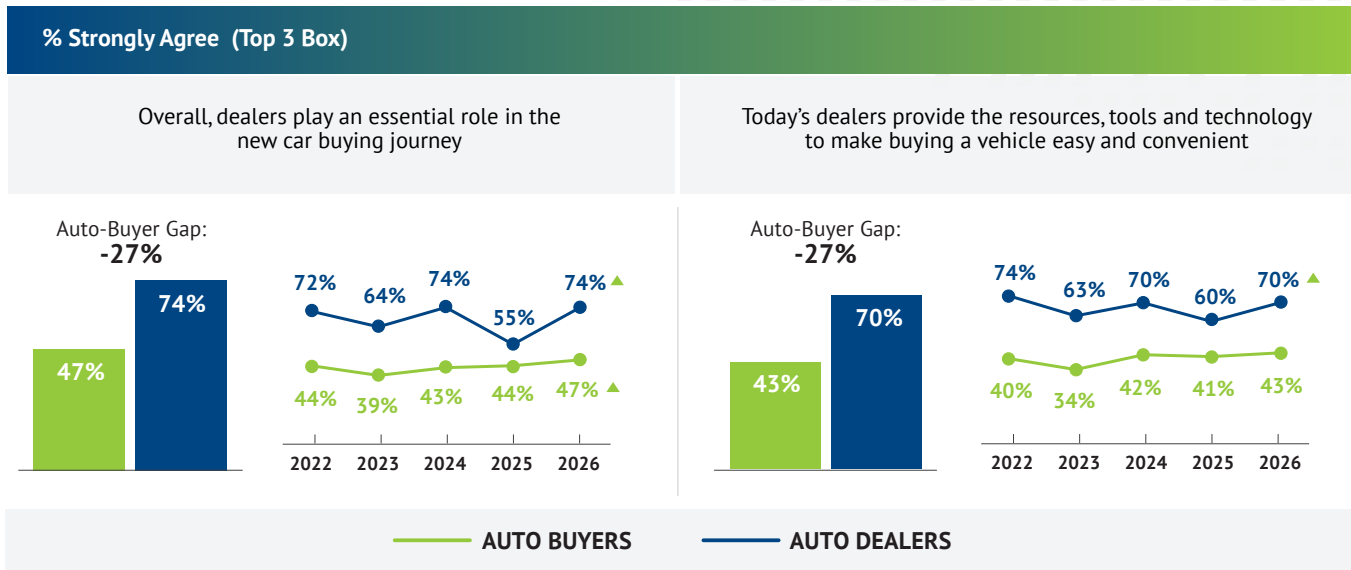


DEALER AND AUTO-BUYER CONFIDENCE IN DEALERSHIP OPTIMIZATION

% Strongly Agree (8-10) Traditional Car Dealership Is Completely Optimized for What the Marketplace Needs in the Future



CONFIDENCE IN DEALERS' ROLE AND EXPERTISE



SECTION 1

The Evolving Buyer Journey – for Dealers

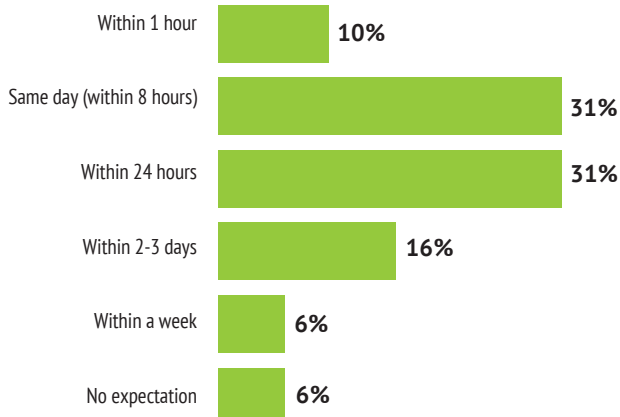
Timely follow-up carries significant weight with auto buyers. Four in five (82%) say follow-up is important or extremely important to them and nearly three-quarters (72%) say they expect to hear from a dealership no later than 24 hours after expressing interest in a vehicle.

Broadly, dealers feel confident in the ability of their sales teams to nurture and convert leads, with 72% saying they are very or extremely confident their sales process converts leads effectively. However, when asked about common limitations in their sales process, 38% of dealers cited a lack of real-time insights into lost sales and 34% pointed to inconsistent follow-up. When asked how long they spend attempting to follow up on a deal on average, most dealers (75%) said less than five minutes, leaving limited time to build momentum with potential buyers. In an increasingly competitive marketplace, there is little room for error when it comes to engaging and converting leads. The data from the 2026 Urban Science Harris Poll Study suggests current follow-up practices among dealers may lack the consistency and rigor needed to capture in-market demand.

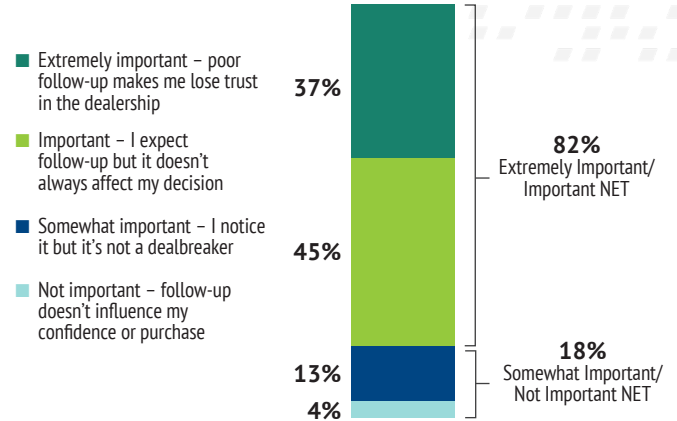
One potential lever for strengthening followup could be the use of artificial intelligence (AI) to automate and scale outreach. However, most dealers are skeptical. Only 14% of dealers say they have confidence in AI tools for lead follow-up, vs. 57% for their in-house sales teams. With dealers continuing to rely primarily on their sales teams to handle lead outreach (at least for now), it's essential salespeople are able to allocate time effectively. That introduces a new challenge. Even when sales teams excel at engaging customers, most dealers complain of limited insight into lead status. Three-quarters (74%) of dealers say they are not fully satisfied with their ability to know if a lead has defected. To close the visibility gap, dealers need daily defection (lost sales) data. Without clear insight into lead status, sales teams risk wasting time following up with lost leads and diverting resources from in-market buyers who expect timely outreach, reducing the overall efficiency of the sales process.

THE IMPORTANCE OF TIMELY FOLLOW-UP TO AUTO BUYERS

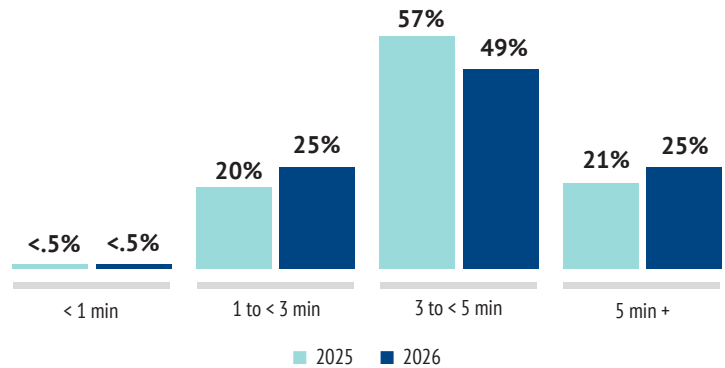
Auto Buyers Expect an Initial Follow-up After Expressing Interest in Vehicle As Soon As...



Importance of Quick Follow-up to Auto Buyers

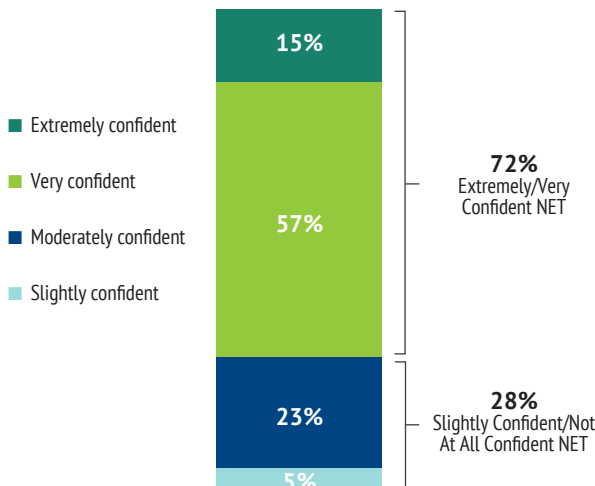


AVERAGE TIME DEALERS SPENT ON LEAD FOLLOW-UP



DEALER CONFIDENCE IN THE SALES PROCESS

Level of Confidence that Sales Process Converts Leads Effectively

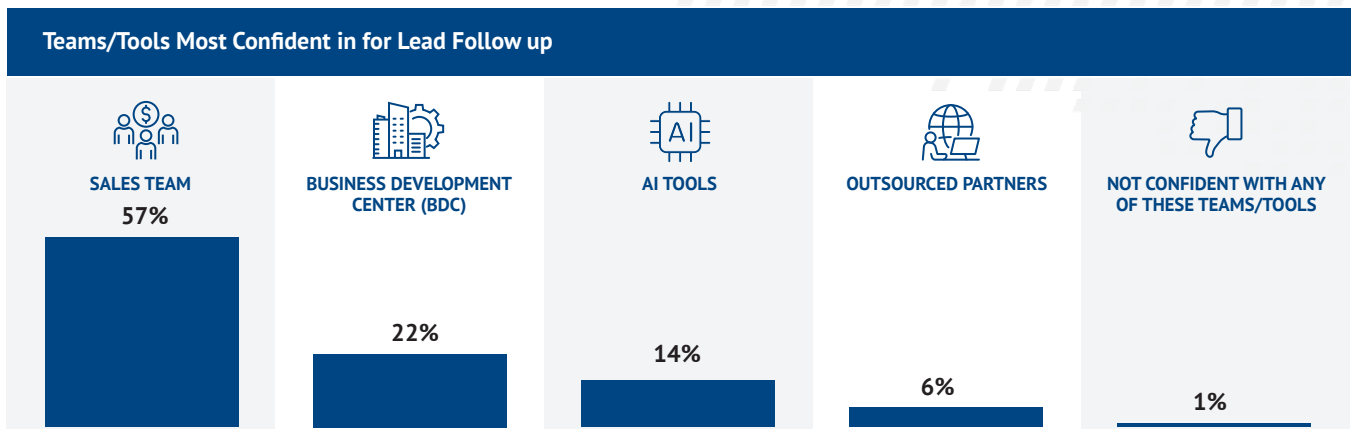


Limits to Efficiency of Their Current Sales Process in Converting Leads

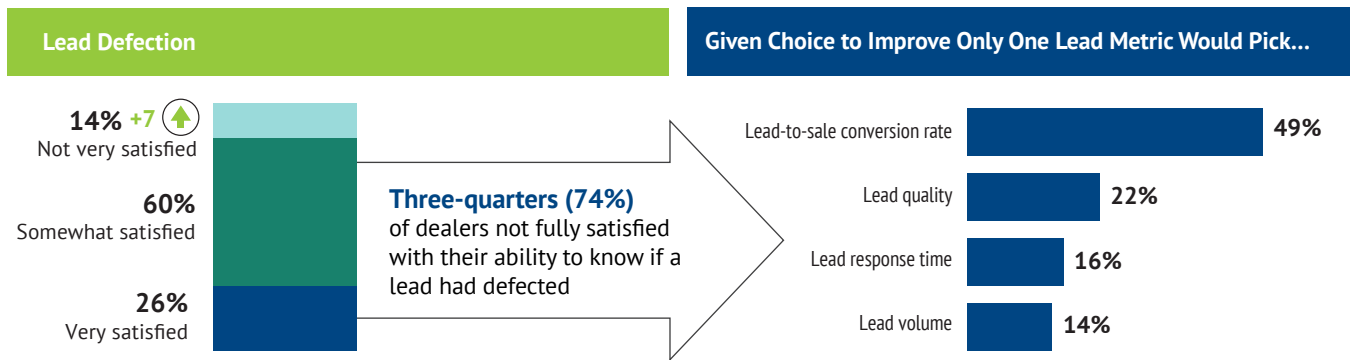


13% Don't think we have an efficiency challenge

DEALER CONFIDENCE IN SALES TEAM VS. AI



DEALER SATISFACTION WITH THE ABILITY TO KNOW IF LEADS HAVE DEFECTED



“Dealers say if they could improve just one lead metric, it would be their lead-to-sale conversion rate. To boost conversion rates, dealers first need a clear understanding of what is driving their sales teams’ wins and losses, including daily defection insights. Once they have visibility into defection patterns, dealers can use that information to drive store performance by making targeted improvements to their follow-up, training and marketing workflows.”

— ERIC DEMONT, GLOBAL PRODUCT DIRECTOR, DEALERSHIP SOLUTIONS



Solution Spotlight

Buyer expectations for follow up are high and in a competitive market, there’s little room for error. Urban Science’s [SalesAlert™](#) and [TrafficView®](#) solutions equip dealers with daily, industry-wide sales data to track defections, identify opportunities for improvement within the sales process and act on them with speed and clarity.



IN-PERSON BUYING REMAINS THE TOP CHOICE

Dealers have long worried about direct-to-consumer (DTC) models cutting into their market share. But findings from the 2026 Urban Science Harris Poll Study show auto-buyer preferences around dealership format remain relatively stable. Nine in 10 U.S. auto buyers said they would consider purchasing from a traditional dealership, while non-traditional retailers such as CarMax or Carvana trailed with just 54% buyer consideration. That said, 66% of auto buyers indicated they would consider purchasing directly from a traditional dealership's website, showing fully online experiences are not out of the question.

PURCHASING FORMATS AUTO BUYERS WOULD CONSIDER

Stable Buyer Preferences Keep Traditional In-Person Dealerships The Most Considered Buying Format



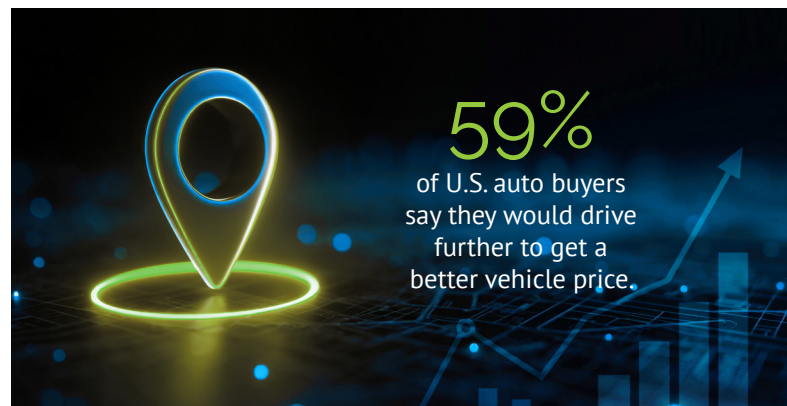
SECTION 2

The Evolving Buyer Journey – for OEMs

As the buyer journey becomes more fragmented and self-directed, it's important OEMs deliver the right level of convenience to attract and retain vehicle buyers. However, auto-buyer expectations for convenience differ depending on whether they're buying or maintaining a vehicle. When choosing which dealership to purchase from, buyers consider many factors, but price and vehicle availability win out, as 59% of U.S. auto buyers say they would drive further to get a better vehicle price. In comparison, almost half (45%) of U.S. auto buyers say they would be less willing to travel far for service than for a new-vehicle purchase.

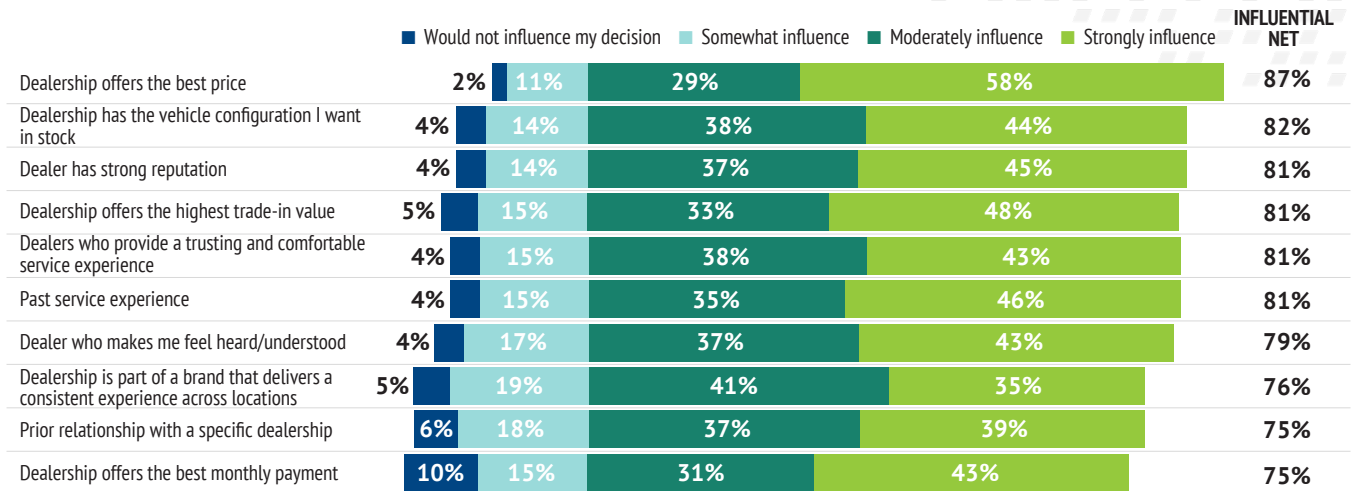
When comparing U.S. travel distance averages to dealerships for sales and service, Urban Science found 50% of national retail sales are from consumers within 12 miles of the dealership. In contrast, 50% of national service visits come from consumers within five miles of the dealership, demonstrating proximity is significantly

more important for aftersales. To close the distance between customer expectations and service access, many OEMs are investing in alternative service models, such as mobile service and concierge programs, to bring service closer to home.

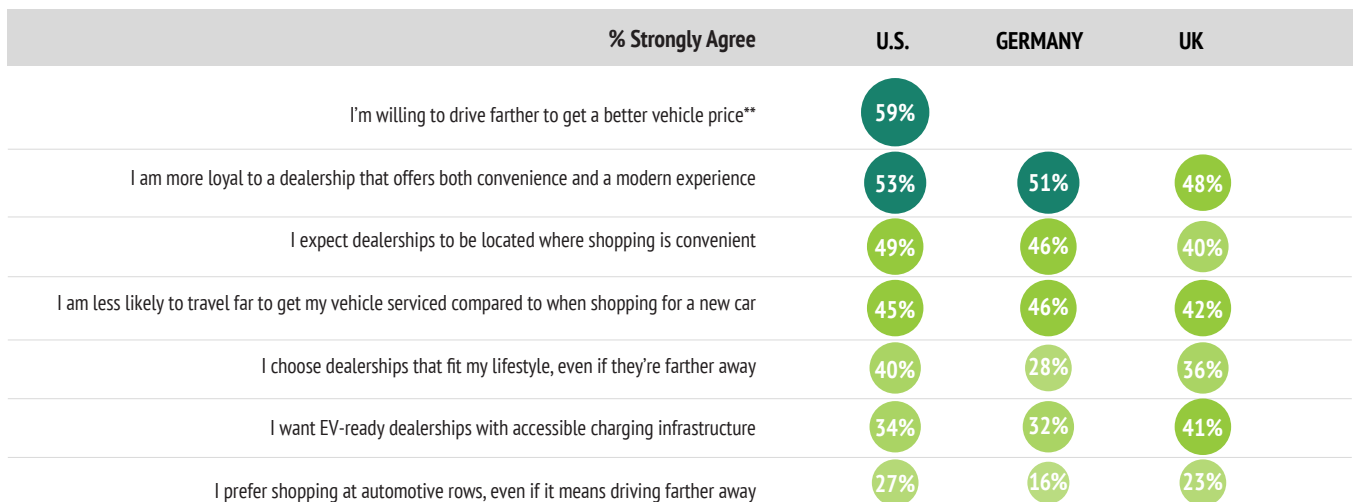


FACTORS AUTO BUYERS CONSIDER WHEN CHOOSING WHERE TO BUY

Factors Influencing Decisions to Choose One Dealership Over Another – Top 10



AUTO-BUYER WILLINGNESS TO DRIVE FOR SALES VERSUS SERVICE



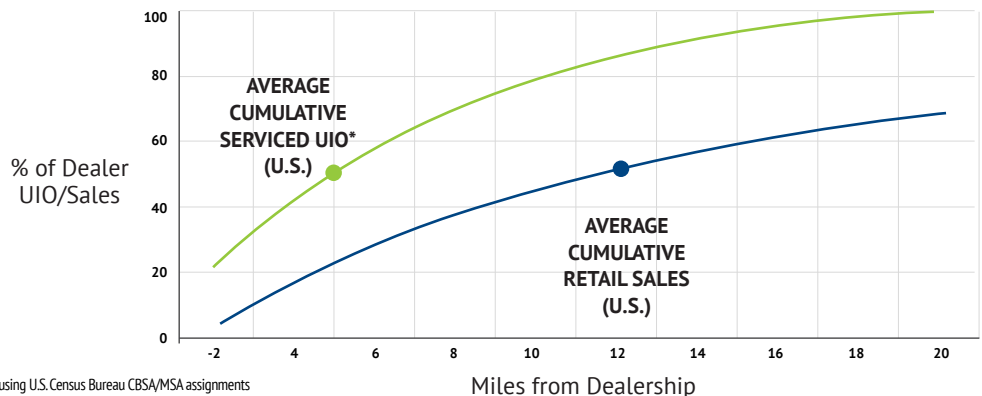
** New question in 2026

AVERAGE TRAVEL DISTANCE TO DEALERSHIPS FOR SALES VERSUS SERVICE

Comparing Sales vs. Service Convenience

50% of national
RETAIL SALES are within
12 miles

50% of national
SERVICE VISITS are within
5 miles



* North American markets with only one dealer representing brand
 * UIO capped at 20 miles from each location (2.6% UIO >20 miles)
 Source: DataHub™: 2024 UIO & 2024 Retail Sales Markets defined using U.S. Census Bureau CBSA/MSA assignments

Growing the Sales-to-Service Pipeline

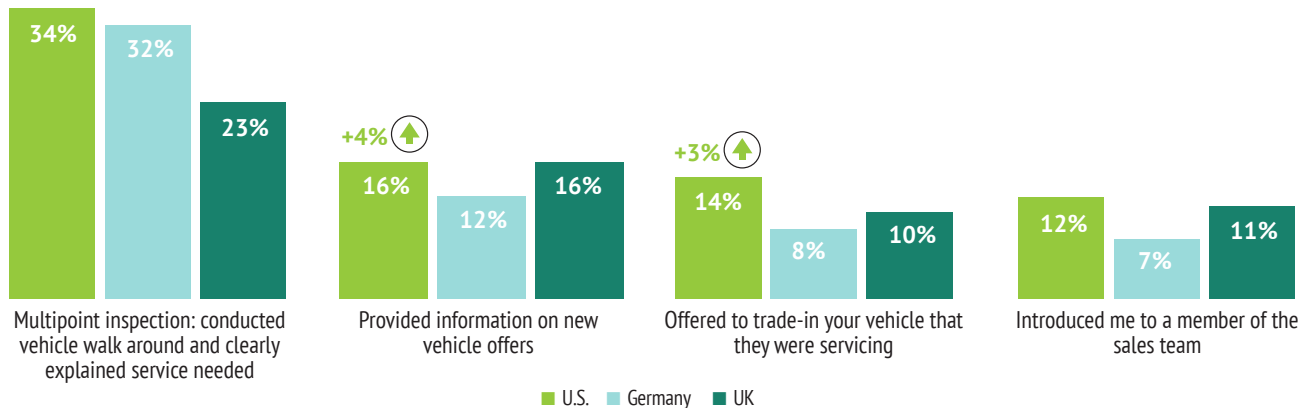
Service and sales are closely connected. When leveraged correctly, service can play a central role in customer retention. However, most dealers aren't fully capitalizing on the additional opportunities already-lucrative service visits present. When asked about their last service visit, only 16% of U.S. auto buyers said they received information on new-vehicle offers. Similarly, only 14% reported receiving a trade-in offer on their current vehicle and just 12% were introduced to a member of the sales team.

To capture more of the available service demand, automakers and dealers need to lean into the customer experience. As it stands, only one in three buyers (34%) say they received a multipoint inspection at their last service visit. The relatively low utilization of these inspections represents a missed opportunity, as the majority of auto buyers who did receive one purchased some or all of the recommended services.

DEALER UTILIZATION OF SERVICE VISITS FOR SALES OPPORTUNITIES

Service Trends Among Owners

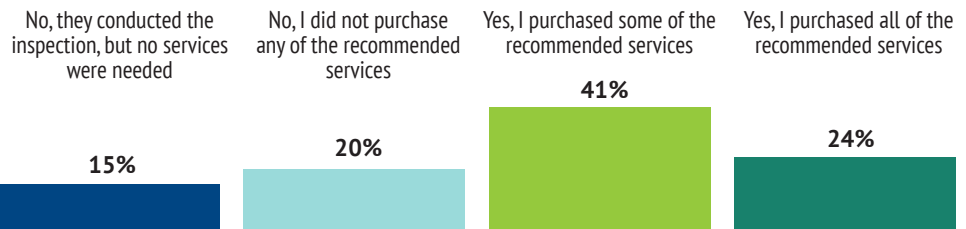
Think about the last time you had your vehicle serviced at a dealership. Did a member of the staff do any of the following?



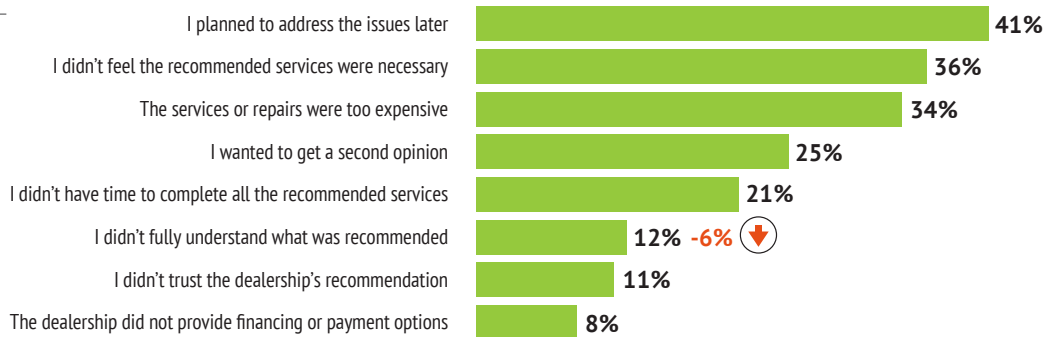
REASONS AUTO BUYERS SKIP RECOMMENDED SERVICES

Purchase Any of the Services or Repairs Recommended During the Inspection

1 in 3
auto buyers received a multipoint inspection



Main Reasons Did Not Purchase All Recommended Services or Repairs During Multipoint Inspection





Solution Spotlight

Parts and service departments are the primary profit generators for a dealership and a major driver of customer loyalty. Urban Science's [ServiceView™](#) solution helps OEMs identify opportunities to increase service retention, making dealerships more competitive and driving revenue growth across the network.

Solution Spotlight

As market conditions shift and consumer demand evolves, OEMs need an agile approach to network planning. Urban Science's [NetworkPlanner™](#) combines advanced analytics, real-time market insight and scenario planning tools to help automakers evaluate network performance, optimize their retail footprints and confidently decide where to invest next.



“Multipoint inspections present a clear opportunity to boost service revenue. What’s notable is, in many cases, cost is not the primary barrier to moving forward with repairs. Among buyers who received a multipoint inspection but declined the recommended services, the reasons most often came down to timing, doubt the services were necessary and then cost, reinforcing the importance of trust in the aftersales relationship.”

— **PIERMICHELE ROBAZZA, GLOBAL PRACTICE DIRECTOR, AFTERSALES**



DEALERS FACE AUDIT FATIGUE

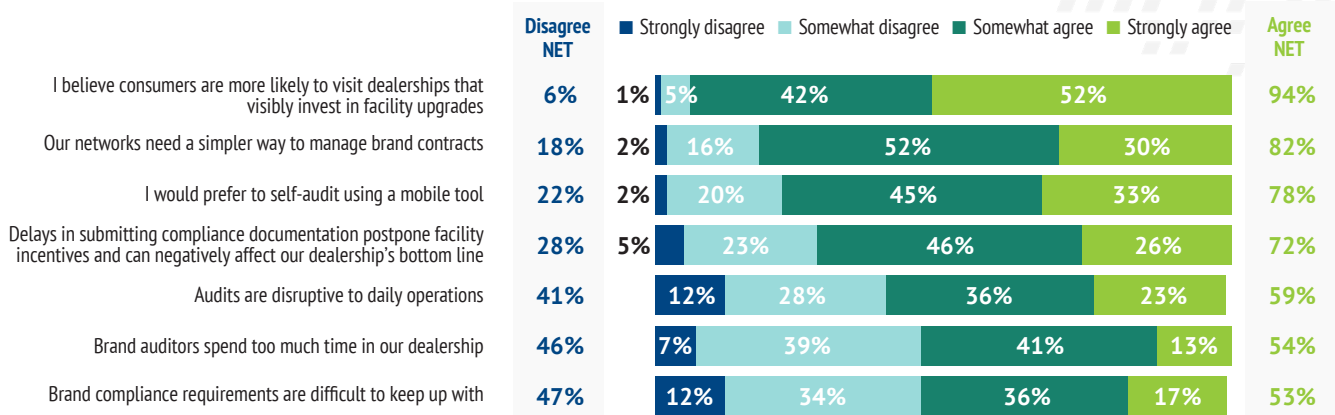
As OEMs look to optimize network performance and deliver a consistent customer experience, dealer compliance with brand and facility standards is key. However, the processes used to enforce those standards are creating friction at the dealership level. Dealers are frustrated with traditional audit processes, which they say are disruptive and time consuming. The majority (59%) agree audits are disruptive to daily operations and 82% say their network needs a simpler way to manage brand contracts. At the same time, almost all dealers (94%) believe consumers are more likely to visit dealerships investing in facility upgrades, demonstrating the business value of meeting OEM standards.

The solution to dealers’ audit fatigue may be surprisingly attainable. More than three-quarters of dealers (78%) say they would prefer a self-auditing mobile tool to streamline the process, which could help both dealers and OEMs save time and reduce costs.



DEALER VIEWS ON BRAND COMPLIANCE, FACILITY STANDARDS AND AUDITS

Agreements about Brand Compliance, Facility Standards and Auditing Practices



Solution Spotlight

Audit and compliance processes require speed and coordination. [NetworkDynamics™](#) serves as a single source of truth, enabling OEMs to manage contracts, track compliance and streamline the auditing process. With a mobile-first design, OEMs can easily connect with dealers, simplifying communication and collaboration across the network.

SECTION 3

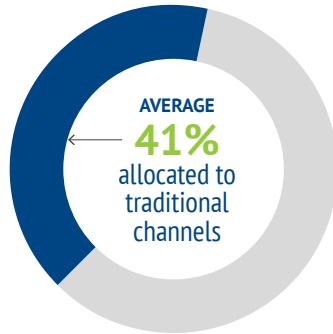
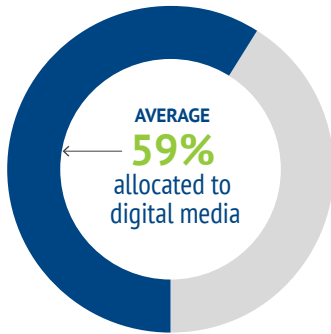
The Evolving Buyer Journey for AdTech

Dealers and the agencies supporting them are investing heavily in digital channels. On average, dealers say more than half (59%) of their marketing and media budgets are allocated to digital media. However, measuring the impact of digital advertising remains a pervasive challenge, pointing to a need for better, more trustworthy tracking tools. Dealers most commonly use return on ad spend (ROAS) to measure media effectiveness, but data from the 2026 Urban Science Harris Poll Study suggests few have the capabilities to connect media spend directly to sales. Just 35% say they measure the effectiveness of media spend against offline vehicle sales. Of those, almost half (45%) rely on registration data (which can trail actual sales activity by months) to track competitor sales, rather than using daily industry sales data.

Meanwhile, dealership websites are a trusted online resource for shoppers, particularly as they move closer to purchase. When asked which sources they rely on most, auto buyers cited dealership websites (47%), followed by search engines (43%). There's a lesson here for Tier 1 agencies: Dealership websites dominate late-stage research, far outweighing the influence of OEM sites. While Tier 1 agencies tend to push their key performance indicators (KPIs) toward OEM- and brand-specific websites, data shows only 33% of auto buyers even visit these sites when shopping for a vehicle. Shifting measurement toward sales outcomes rather than proxy metrics like website visits can provide a much clearer, more definitive view of ad performance.

DEALER MEDIA/MARKETING BUDGET ALLOCATION

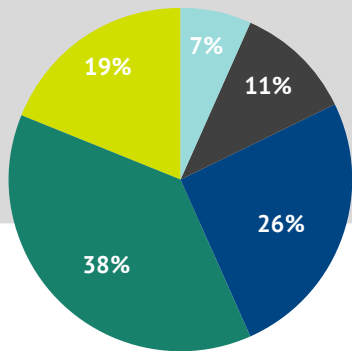
Typical Media/Marketing Budget Allocation



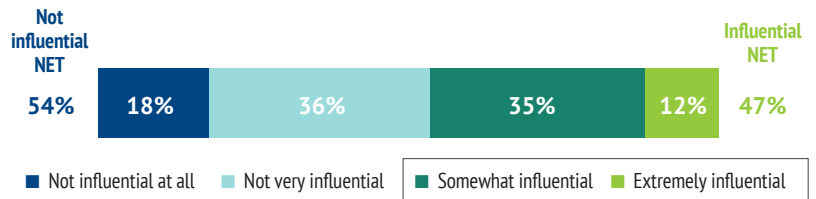
INFLUENCE OF ONLINE ADS ON AUTO-BUYER DECISIONS

Amount of Influence Online Ads Have on Car-Buying Decision

93%
Majority of auto buyers notice car ads while browsing online

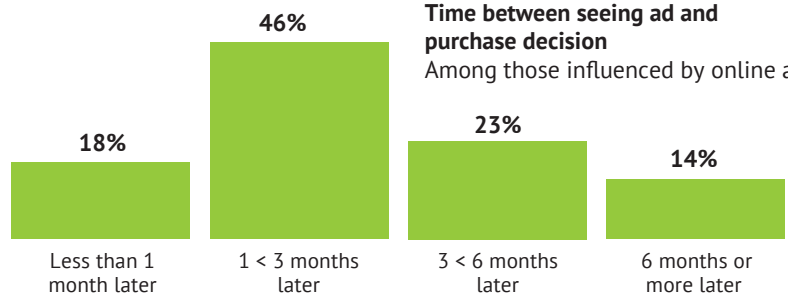


■ Always ■ Often ■ Sometimes ■ Rarely ■ Never



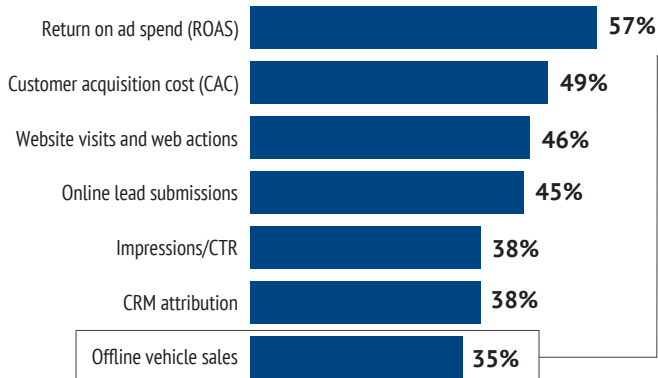
Time between seeing ad and purchase decision

Among those influenced by online ads

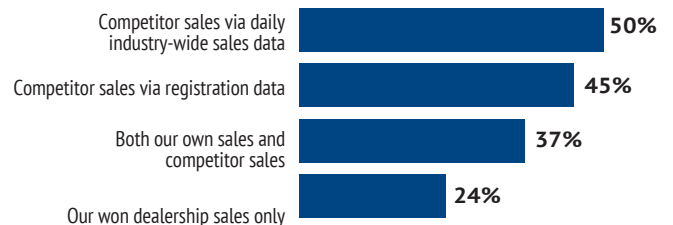


DEALER METHODS OF MEASURING THE EFFECTIVENESS OF AD SPEND

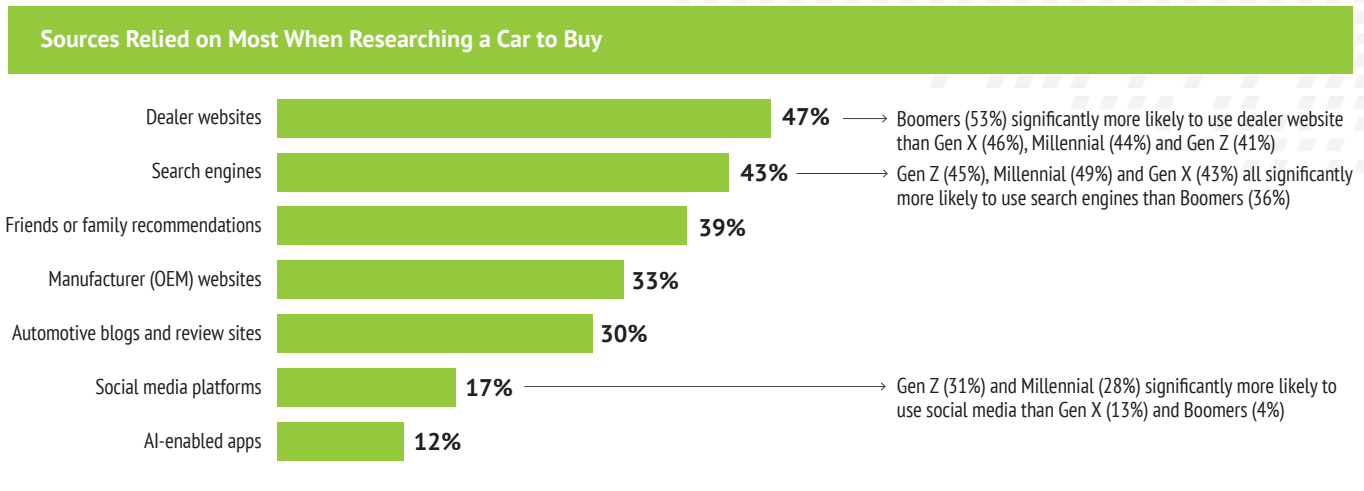
Ways Dealers Measure the Effectiveness of Media/Marketing Spend



Ways Dealerships Track Digital Media Advertising for Offline Vehicle Sales



SOURCES AUTO BUYERS RELIED ON MOST FOR VEHICLE RESEARCH



ROLE OF DEALERSHIP WEBSITE AS SHOPPERS MOVE CLOSER TO PURCHASE

Shopping Journey	Starting Your Search (learning about different vehicles)			Comparing and Narrowing Down (checking prices, features and reviews)			Getting Ready to Buy (confirming choice and preparing to purchase)				
	Manufacturer website	Dealer website	Third-party website	Social media platforms	Manufacturer website	Dealer website	Third-party website	Social media platforms	Manufacturer website	Dealer website	Third-party website
Manufacturer website	26%	27%	22%	15%	22%	31%	27%	11%	17%	46%	15%
Dealer website	27%	27%	22%	15%	31%	31%	27%	11%	46%	46%	15%
Third-party website	22%	27%	22%	15%	27%	31%	27%	11%	15%	15%	15%
Social media platforms	15%	27%	22%	15%	11%	31%	27%	11%	8%	8%	8%



“The way consumers interact with websites has changed in recent years. While auto buyers still visit automotive websites, their journeys are more fragmented and harder to track using traditional methods and metrics. To deliver relevant reach and accurately assess performance, it's vital to begin with consistent, high-quality outcome data such as daily offline sales.”

— CARL MATTER, DIRECTOR, ADTECH PERFORMANCE



Solution Spotlight

Automotive marketers are under increasing pressure to make every media dollar work harder. Urban Science's [Media Performance](#) solution suite leverages the industry's only source of daily automotive sales data to target buyers who are up to 25 times more likely to purchase a vehicle, while suppressing those who have already purchased. Meanwhile, [SalesMatch™](#) links media exposure directly to offline sales, allowing marketers to measure and demonstrate the true impact of their campaigns.



To EV or Not to EV?

EV momentum is fragmented. One-third (36%) of auto buyers say they are now less likely to purchase an EV due to new federal policies, while almost half (47%) say they will never be ready for an EV. This EV hesitancy is contributing to a split between buyers and dealers on powertrain priorities. The majority (60%) of dealers

say they are excited about EVs and 34% plan to rapidly expand their focus on the powertrain. In contrast, 31% of auto buyers think automakers should prioritize hybrid powertrains until challenges with EVs, such as range and charge time, are fully addressed.

DEALER AND AUTO-BUYER ATTITUDES TOWARD HYBRIDS VS. BEV

Stable Buyer Preferences Keep Traditional In-Person Dealerships The Most Considered Buying Format

Federal policy changes have impacted EV readiness among U.S. auto buyers...

36% are now **less likely to purchase an EV** because of new federal policies

47% say they will **never be ready to accept an EV**

11% say their **next vehicle will be an EV**



Consumers signal they want hybrids, while dealers continue to push towards BEVs

Say **automakers should prioritize hybrids until challenges** related to fully electric vehicles **are addressed**

31% of auto buyers

16% of dealers



34% of dealers plan to rapidly expand their EV focus

60% of dealers are excited about EVs



Automakers weighing EV investments must walk a fine line. With many buyers hesitant to invest in an all-electric powertrain, hybrids are emerging as the more viable short-term option. For OEMs, positioning the network to support this shift, while preserving the ability to meet evolving EV demand, will be critical for capturing emerging opportunities."

— GREG SCHOCKE, EXECUTIVE VICE PRESIDENT OF PRODUCT STRATEGY AND DEVELOPMENT



Solution Spotlight

To assess whether they are fully capturing demand across vehicles and powertrains, OEMs need timely visibility into market performance. [MarketView™](#) leverages competitive sales insights, updated daily, to deliver a complete picture of who is selling what, where and how much. The platform, which includes a dedicated EV dashboard, allows users to track and analyze sales, market share and percentage changes by segment, model or geography to identify opportunities to improve sales performance.

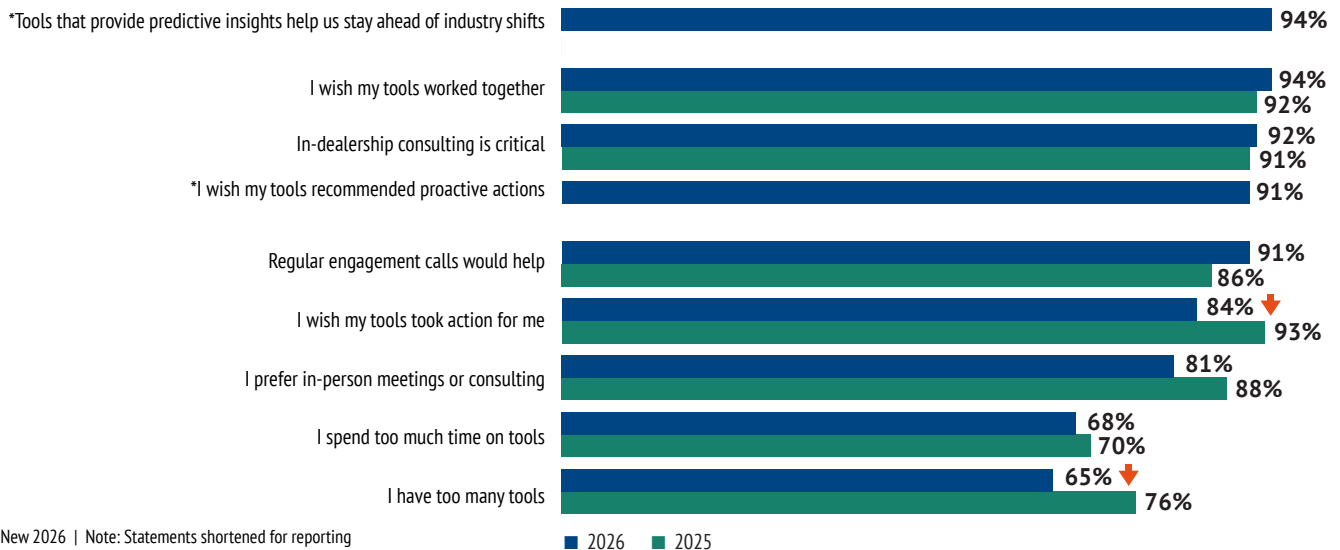
Dealers Want Predictive Intelligence They Can Actually Use

Dealers are overwhelmed by the rising demands of performance measurement. They want tools to help them translate the vast amounts of data they manage into simple, actionable insights helping them sell more cars and reduce waste. However, as noted earlier in the report, dealers have grown skeptical of AI in some areas, like customer follow-up. Their standards for AI and machine learning (ML) are higher than in the past and they want predictive capabilities that can integrate into their existing workflows to simplify their daily tasks.

Almost all dealers (94%) say they see tools that provide predictive insights as crucial to staying ahead of industry shifts. Dealers believe predictive insights would be particularly impactful for customer targeting (48%), market demand forecasting (47%), inventory planning (44%) and service targeting (43%). They're enthusiastic about predictive intelligence for forecasting, with 89% agreeing predictive forecasts of consumer demand for sales and service would help them improve sales strategies.

DEALER ATTITUDES TOWARD PERFORMANCE TOOLS

Attitudes about Performance Tools Strongly/Somewhat Agree (NET)



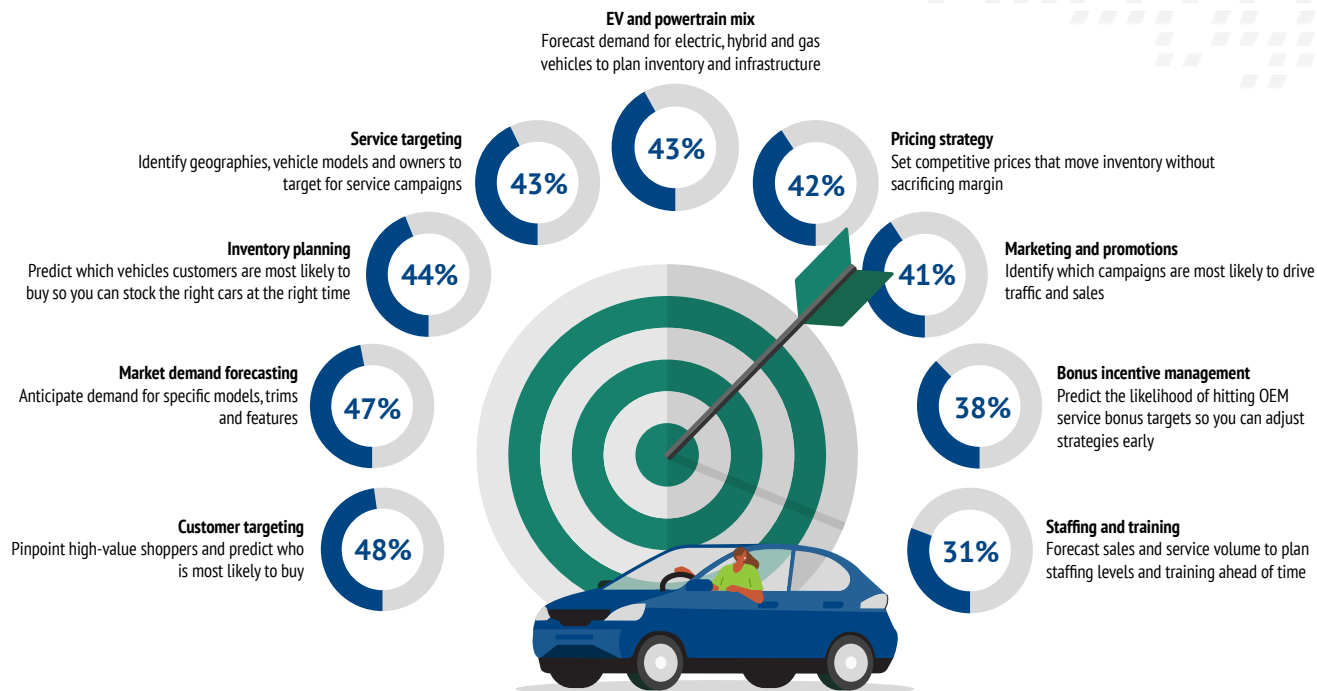
"AI is only as effective as the data it's trained on. While most AI in the automotive industry runs on incomplete or lagging data, Urban Science's SciAI framework is trained on an unrivaled proprietary sales and service dataset, updated daily. It spans the full market and is shaped by nearly 50 years of continuous refinement, delivering intelligence that works faster and reaches further for every client and solution."

— TOM KONDRAT, GLOBAL LEAD, ADVANCED ANALYTICS



AREAS DEALERS BELIEVE WOULD BENEFIT MOST FROM PREDICTIVE INSIGHTS

Areas That Would Benefit Most from Predictive Insights



Solution Spotlight

SciAI is the intelligence framework unifying Urban Science's AI capabilities across every solution we offer. It encompasses three distinct forms of intelligence: predictive, interpretive and prescriptive.

- **Predictive Intelligence** powers lead scoring, defection prediction, market opportunity identification and demand forecasting across [MarketView](#), [ServiceView](#) and [FinancialView](#)™.
- **Interpretive Intelligence** translates complex analytics into plain-language insights helping users immediately understand what's happening in their business and why.
- **Prescriptive Intelligence** uses a trained large language model (LLM) to generate specific, actionable recommendations for improving underperforming KPIs, all grounded in proven Urban Science data.

Together, these capabilities make our data more accessible, our recommendations more precise and our tools more intuitive for OEMs and dealers, and the agencies that support them, each day.

89%

of U.S. dealers agree predictive forecasts of consumer demand for sales and service would help them improve sales strategies.



Data Availability Vs. Data Reliability

Auto buyers are becoming more open to sharing their personal data with dealerships. This year, 76% said they would be comfortable completing forms with personal information to request vehicle information and 24% indicated their willingness to share personal information had increased over the past year. Good news for dealers, who can use this information to personalize outreach and improve lead engagement.

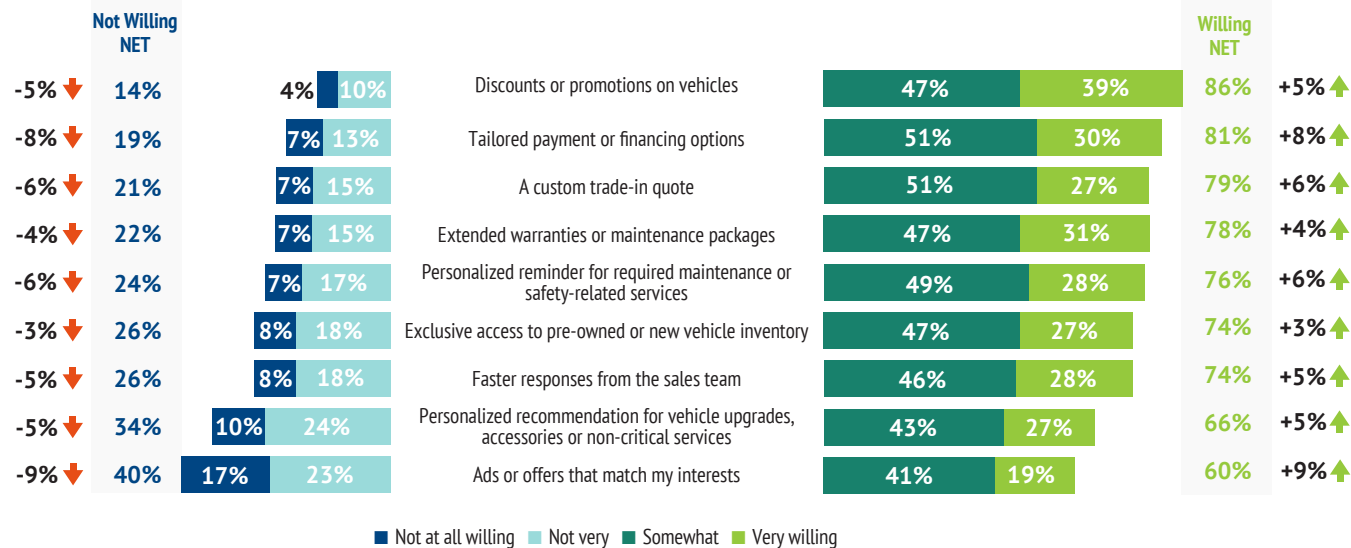
However, greater access to customer data does not automatically translate to better outcomes. Dealers say

they need more reliable and trustworthy systems to manage and leverage their data effectively. Almost half (47%) of dealers agree data trust is critical to making confident financial decisions, yet 40% say inaccurate or incomplete data has negatively impacted performance. One-third (35%) of dealers say they often question the reliability of the data they receive from their systems, highlighting a disconnect between data availability and data confidence.

AUTO-BUYER COMFORT WITH SHARING PERSONAL DATA



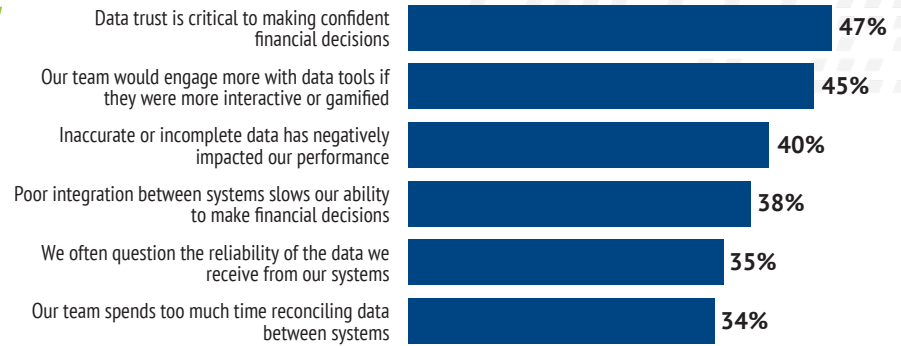
Willingness to Share Information with Dealership in Exchange for Benefits



DEALER OPINION OF DATA ACCURACY AND SUBMISSION TOOLS

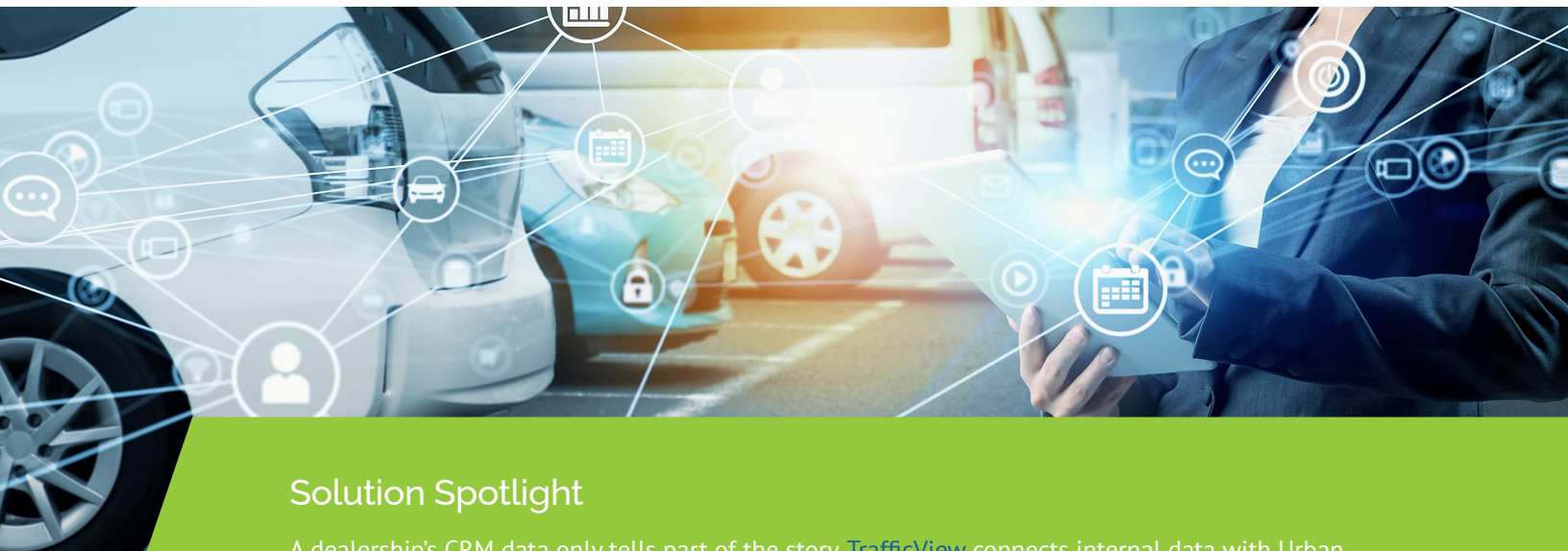
Just Over 40% Dealers Say They Need More Trustworthy & Interactive Data Systems

Best Description of Dealership's Experience With, or Opinion of, Data Accuracy and Submission Tools



"Better decisions start with better data. But when dealers are grappling with poor integration between different sources or conflicting information, it's hard to know which insights to act on. As the industry's only source of daily automotive sales data, Urban Science helps dealers identify their highest-potential opportunities so they can focus their sales efforts and marketing investments where they will have the greatest impact."

— ERIC DEMONT, GLOBAL PRODUCT DIRECTOR, DEALERSHIP SOLUTIONS



Solution Spotlight

A dealership's CRM data only tells part of the story. [TrafficView](#) connects internal data with Urban Science's daily automotive sales and defection data to provide a holistic view of dealership performance. Dealers can break down findings by lead source, model, salesperson and geography to pinpoint where sales are being lost and address inefficiencies in their sales and marketing processes.



Unlock Your Breakthrough Potential With Urban Science

Ready to apply the findings from the 2026 Urban Science Harris Poll Study to your business? Let us help you break through. Get in touch with us today!

[Contact Urban Science](#)



URBAN SCIENCE®

About Urban Science

Urban Science® is a leading automotive consultancy and technology firm that serves automotive original equipment manufacturers (OEMs) and dealers, and the AdTech companies that support them, around the world. Headquartered in Detroit and operating in 18 office [locations](#) globally, Urban Science taps the power of its science – and its unrivaled data, solution offerings and industry expertise – to create clarity and business certainty for clients in even the most chaotic market conditions.

Visit UrbanScience.com for more information about how Urban Science helps the automotive industry gain a competitive edge by taking the guesswork out of critical business decisions. This, in turn, drives improved efficiency and profitability industrywide.



The Harris Poll

Harris Insights & Analytics LLC, A Stagwell Company

About The Harris Poll

The Harris Poll is one of the longest-running surveys in the U.S., tracking public opinion, motivations and social sentiment since 1963. The Harris Poll is now part of Harris Insights & Analytics, a global consulting and market research firm that strives to reveal the authentic values of modern society to inspire leaders to create a better tomorrow. We work with clients in three primary areas: building 21st Century corporate reputation, crafting brand strategy and performance tracking and earning organic media through public relations research. Our mission is to provide insights and advisory to help leaders make the best decisions possible.

Method Statement:

This survey was conducted online by The Harris Poll on behalf of Urban Science among 3,012 U.S., 1,001 Germany and 1,001 UK adults aged 18+ who currently own or lease or plan to purchase or lease a new or used vehicle in the next 12 months (referred to in this report as "auto-buyers" or "auto-buying public") and 252 U.S. OEM automotive dealers, whose titles were Sales Manager, General Manager or Principal/VP/Owner.

The auto-buying public surveys were conducted from January 5 to January 28, 2026. Data are weighted where necessary by demographics to bring them in line with their actual proportions in the population. The dealer survey was conducted from January 5 to February 4, 2026. Data were weighted as needed based on the average of current and previous waves for gender, car types sold, job title and urbanicity.

The sampling precision of Harris online polls is measured by using a Bayesian credible interval. For this study, the sample data is accurate to within ± 2.3 percentage points for U.S. auto buyers, ± 3.6 for Germany auto buyers, ± 3.5 for UK auto buyers and ± 7.2 for U.S. OEM automotive dealers using a 95% confidence level.

For complete survey methodology, including weighting variables and subgroup sample sizes, please contact Amy Bowering (arbowering@urbanscience.com).

