What drives consumers along the automotive purchase journey?
Weve’s base of **22 million UK adults** provides access to a nationally representative **primary research base** for **robust market and sector insight**.

The billions of network events we see each day build up a picture of **your customers**. Weve **understand where consumers are in the purchase cycle** and can **influence behaviour at every stage**.

- **Live May 2017:** SMS invite, linking through to online survey
- **Sent to 70,000 18+ year old smartphone owners**
- **Response sample = 1,979 UK Adults**
- **Data can be cut by any brand, demographic, car type, etc.**
We wanted to understand the role mobile played at every stage of the car buying journey.

With over 84% of consumers using their mobile to research a car, mobile continues to play an increasingly relevant role in the car buying process.

With shorter purchase journeys than ever, understanding the behaviours and drivers at every stage is critical to better tailor advertising dependent on where consumers are in that journey.

When planning campaigns, it’s important to consider mobile as a crucial part in the research process, across planning, delivery and measurement.
84% use their mobile in the car buying process

**INTENT**
Once you get consumers to the dealership, you still risk them going elsewhere. Almost half use their mobile while at the dealership to compare prices elsewhere, find other forecourts, etc.

**CONSIDERATION**
The average research time is 6 weeks, but 45% research a car in 3 weeks or less, meaning every bit of contact must be as relevant as possible.

**AWARENESS**
TV, OOH and mobile drive the highest ad recall, but TV and mobile are the strongest channels in driving action.

**PURCHASE**
9% purchased a car on their mobile, 23% are likely to buy their next car entirely online. What does this mean for the automotive industry?

**LOYALTY**
36% purchased the same brand as their last car, and 54% are likely to do so for their next purchase, making CRM data matching increasingly important.

**KEY FINDINGS**

Base n = 1,979
1/3 of people have bought a car in the last 12 MONTHS

New car buyers
Have bought a car in the last 12 months

In car market
Are in the process of buying a car

33% +1% YOY

6% -3% YOY

Base n = 1,979
Consumers are buying more new cars year on year…

…negatively affecting the sales of second hand cars YOY.

37% Bought new cars in the last year
19% increase YOY

63%
Bought second hand cars in the last year
10% decrease YOY

Base n = 1,979
New car sales are being driven by finance deals.

- **NEW CAR**: 15% (2015), 15% (2016)
- **NEW CAR ON FINANCE**: 14%, 22%
- **DEALER APPROVED USED CAR**: 30%, 34%
- **SECOND HAND CAR**: 29%, 38%

Base n = 1,979
HATCHBACK SALES take the lead for another year

- Hatchback: 50%
- Family Saloon: 14%
- 4X4: 11%
- MPV: 10%
- Sports Car: 8%
- Estate: 4%
- Other: 4%

Base n = 1,979
Taxation and regulation are driving a move towards ALTERNATIVE FUEL SOURCES.

WHAT DRIVERS CURRENTLY OWN

<table>
<thead>
<tr>
<th>Fuel Type</th>
<th>OWNED</th>
<th>FIRST CHOICE FOR NEXT PURCHASE</th>
</tr>
</thead>
<tbody>
<tr>
<td>PETROL</td>
<td>57%</td>
<td>44%</td>
</tr>
<tr>
<td>DIESEL</td>
<td>42%</td>
<td>23%</td>
</tr>
<tr>
<td>HYBRID</td>
<td>1%</td>
<td>13%</td>
</tr>
<tr>
<td>ELECTRIC</td>
<td>0.3%</td>
<td>4%</td>
</tr>
<tr>
<td>HYDROGEN</td>
<td>0%</td>
<td>1%</td>
</tr>
<tr>
<td>FUEL CELL</td>
<td>0.3%</td>
<td>1%</td>
</tr>
</tbody>
</table>

AS A RESULT OF RECENT CHANGES IN TAXATION, CONSUMERS ARE...

- 37% MORE LIKELY TO CHOOSE LOWER EMISSION PETROL CAR
- 22% MORE LIKELY TO CHOOSE ALTERNATIVELY FUELLED CAR
- 18% LESS LIKELY TO BUY DIESEL CAR
- 23% NOT AFFECTED AT ALL

Base n = 1,979
LOOK and BRAND of car influence decisions most

**LOOK**

- Look

**BRAND**

- Brand

**SIZE**

- Size

**SAFETY**

- Safety

**EMISSIONS**

- Emissions

**AFTERSALES**

- Aftersales

**REG PLATE**

- Registration Plate

Women are more likely to say the look of a car influences their decision most.

Men are more likely to say the brand of a car influences their decision most.

Base n = 1,979
How are consumers using their mobiles in the automotive purchase journey?

**AwAreness**
- 57% browsed for car inspiration on their mobile

**Intent**
- 61% searched for nearby dealerships, requested brochures, and booked test drives on their mobile

**Consideration**
- 59% researched and compared prices/specifications on their mobile

**PurChase**
- 9% purchased a car on their mobile

**Loyalty**
- 9% explored aftersales on their mobile

Base n = 1,979
AWARENESS

57% use their mobile to browse for car inspiration
People are **28% more likely** to recall a car ad on **mobile** if already in the **car-buying process**.
...but **TV + MOBILE** are stronger in driving *action*

AND WHICH OF THESE, IF ANY, LED YOU TO TAKE FURTHER ACTION?

i.e. GOOGLE SEARCH, APP DOWNLOAD, ETC.

<table>
<thead>
<tr>
<th>Medium</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>TELEVISION</td>
<td>25%</td>
</tr>
<tr>
<td>MOBILE</td>
<td>11%</td>
</tr>
<tr>
<td>DESKTOP</td>
<td>6%</td>
</tr>
<tr>
<td>PRINT</td>
<td>4%</td>
</tr>
<tr>
<td>RADIO</td>
<td>4%</td>
</tr>
<tr>
<td>CINEMA</td>
<td>3%</td>
</tr>
<tr>
<td>OOH</td>
<td>3%</td>
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</tbody>
</table>

Base n = 1,979
CONSIDERATION

57% use their mobile to research and compare prices/specifications
45% research a car in **under three weeks**
Thinking about your last car, how long did you research before making a purchase?

- 23% A week or less (4% YOY)
- 22% 2-3 weeks
- 26% About a month
- 18% A couple of months
- 5% 3-5 months
- 4% 6-12 months
- 1% 12+ months

**Average time spent researching a car: 6 weeks** (-1 week YOY)

Base n = 1,979
GENERAL MOTORING WEBSITES and DEALERSHIPS are relied upon most in the research process.
57% AWARENESS

59% CONSIDERATION

61% use their **mobile** to book test drives, request brochures, and search for dealerships online
When shopping for a car, did you use your mobile phone in any of the following ways?

- **Booked Test Drive**: 11%
- **Used Car App**: 17%
- **Got a Quote Online**: 28%
- **Called a Dealership**: 37%
- **Searched for Local Dealers**: 47%
- **Searched for Nearby Vehicles**: 59%

The majority are using their mobile in the process.

**Base n = 1,979**

When shopping for a car, did you use your mobile to book test drives, request brochures, and search for dealerships online? 61%
47% even use their mobile while at the dealership

- **11%** Called another dealership to check what's in stock
- **13%** Searched to find another forecourt nearby
- **34%** Checked prices and specifications elsewhere
- **24%** Searched online for deals and discounts

Through **small cell, cellular** and **WiFi data**, we can see what they're doing on their phone when in the dealership, from what **sites they're visiting** to who they're calling.

<table>
<thead>
<tr>
<th>Activity</th>
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<td>34%</td>
</tr>
<tr>
<td>Searched online for deals and discounts</td>
<td>24%</td>
</tr>
</tbody>
</table>

**WHAT ARE THEY USING TO DO THIS WHEN AT A DEALERSHIP?**

- **SEARCH** 52%
- **MOBILE WEB** 49%
- **GENERAL AUTO SITE** 35%
- **CAR BRAND SITE** 32%
- **AUTOMOTIVE APP** 29%
- **NON AUTO SITE** 12%
- **SOCIAL MEDIA** 10%

When in a car dealership/on the forecourt, did you use your mobile for any of the following? And what did you use to do this?

Base n = 1,979
DEALERSHIP VISIT INSIGHT
23% go through the entire consumer journey on their mobile and then buy in a dealership.

9% purchased a car on their mobile.
23% go through the entire journey on their mobile and then buy in a dealership

Location technology and transactional data are tools to track them through to, and beyond, purchase, making mobile a critical tool in tracking the automotive purchase journey.

As a telco, we track online and offline behaviour to give you a full and precise view of the individual car buyer

Base n = 1,979
23% are likely to buy their next car entirely online, without ever visiting a dealership.

11% very likely  
12% quite likely

Base n = 1,979
GOOD CUSTOMER SERVICE, SPEED & EASE OF PROCESS, and KNOWLEDGEABLE STAFF are key to the ‘perfect purchase’

“Good customer service, speed & ease of process, and knowledgeable staff are key to the ‘perfect purchase’

- “All done online, delivered direct to my door.”
- “Pictures on car websites being fully 360 explorable pictures, so the car can be looked at from any view.”
- “A process that takes just 24 hours from start to finish.”
- “Online, no sales people!”
- “Not having to haggle.”
- “Friendly staff and good after-sales service.”
- “A personality quiz as to what car would suit my lifestyle.”
- “An easy process that filters the car type, size, price etc. of the car that I need.”
- “Totally honest sales people, offering safe reliable cars at reasonable prices.”
- “Someone asking questions, who knows what they’re talking about, to help find the perfect match for what I require.”

Base n = 1,979
LOYALTY

57% explored aftersales options on their mobile

61% considered options on their mobile

59% looked into options on their mobile

9% made a purchase on their mobile

9% made a purchase on their mobile
USER REVIEWS are more important than ever when choosing a garage.

When you need your car repaired or serviced, what is the most important factor in choosing a garage?

- **Approved by car dealer/manufacturer**: 31% (+1% YOY)
- **Known garage brand (Kwik Fit)**: 6% (-1% YOY)
- **Cheapest service**: 8% (+0% YOY)
- **Most conveniently located**: 17% (-2% YOY)
- **Good user reviews**: 35% (+2% YOY)

Base n = 1,979
What makes drivers BRAND LOYAL?

36% Purchased the same brand as their previous car

31% VERY LIKELY

54% are likely to buy a car of the same brand they currently own for their next purchase

23% QUITE LIKELY

Interested in particular brand owners? Ask us to cut the data.

AUDI owners are the most loyal of all brand owners, significantly over indexing in likelihood to purchase their next car from the same brand.
WIDER INDUSTRY
Attitudes towards driverless cars are evolving

- 21%: Driverless cars are as safe or safer than cars with human drivers
- 22%: I’d be happy to never drive again and let my car drive me
- 28%: I would trust driverless cars to get me to my destination safely

48% know a bit about driverless cars
31% are very familiar with driverless cars

Base n = 1,979
The uses of mobile connectivity are wide

“Which of the following would you find useful to do from your mobile?”

- 58% Stolen vehicle tracking
- 54% In-car Wi-Fi
- 44% Find my vehicle
- 36% Emergency call
- 36% Vehicle health
- 36% Automated or assisted parking
- 20% Pay as you go insurance

Base n = 1,979
Consumers are willing to share their data with third parties...

- Driving data to your insurance company for reduced insurance costs: 45% yes
- Data to your car manufacturer to help them design their future cars: 53% yes
- Location data to the government to help them choose where to upgrade road infrastructure: 40% yes
- Data on your speed to the government to track how fast you drive: 20% yes

Base n = 1,979
The value exchange extends into advertising.

36% QUITE USEFUL

23% VERY USEFUL

56% would find it useful if their car were able to send them local, relevant offers based on their location.

Base n = 1,979
KEY FINDINGS

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Mobile data is an invaluable tool in the planning, delivery and measurement of automotive campaigns.

The path to purchase is getting shorter, so it’s more important than ever to reach consumers at moments that most influence their decisions. In a highly involved and measured purchase like a car, mobile data plays a critical role in identifying and understanding consumer mindsets from the beginning of the purchase journey, target them accordingly and measure campaign performance.
BASE DEMOGRAPHIC

Gender

- Male: 46%
- Female: 54%

Children

- Yes in household: 43%
- Yes but not living with me: 40%
- No: 17%

Age

- 18-24: 16%
- 25-34: 27%
- 35-44: 24%
- 45-54: 18%
- 55+: 15%

Base n = 1,979
BASE DEMOGRAPHIC

Social Grade

- A: 13%
- B: 23%
- C1: 18%
- C2: 15%
- D: 6%
- E: 11%
- Student: 8%
- Don’t know: 6%

Base n = 1,979
BASE DEMOGRAPHIC

Region

<table>
<thead>
<tr>
<th>Region</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>SE England</td>
<td>17%</td>
</tr>
<tr>
<td>SW England</td>
<td>9%</td>
</tr>
<tr>
<td>London</td>
<td>8%</td>
</tr>
<tr>
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<td>4%</td>
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<tr>
<td>East Midlands</td>
<td>7%</td>
</tr>
<tr>
<td>West Midlands</td>
<td>7%</td>
</tr>
<tr>
<td>Yorkshire &amp; The Humber</td>
<td>9%</td>
</tr>
<tr>
<td>NE England</td>
<td>5%</td>
</tr>
</tbody>
</table>

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WEVE
THE HUMAN INTELLIGENCE NETWORK