What drives consumers along the **automotive purchase journey?**

Weve Primary Automotive Research 2017

WE ARE THE **HUMAN INTELLIGENCE NETWORK.**

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.

WEVE

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.

Live May 2017 | Response sample = 1,979 UK adults

KEY FINDINGS

84% use their **mobile** in the car buying process

AWARENESS

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

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.

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.

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?

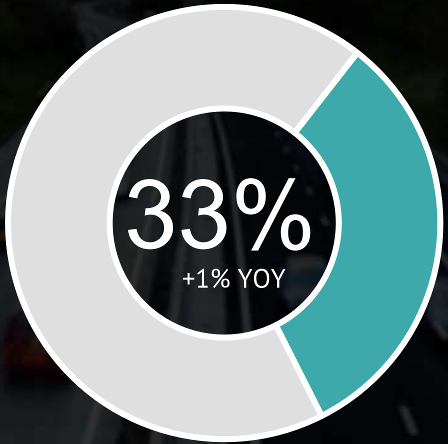
LOYALTY

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.

Base n = 1,979

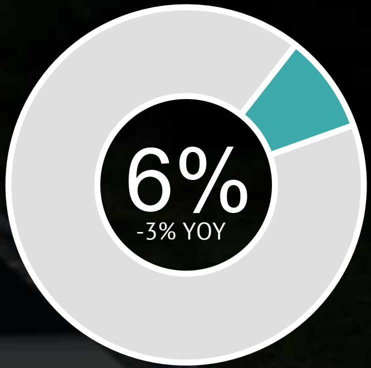
WEVE

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

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

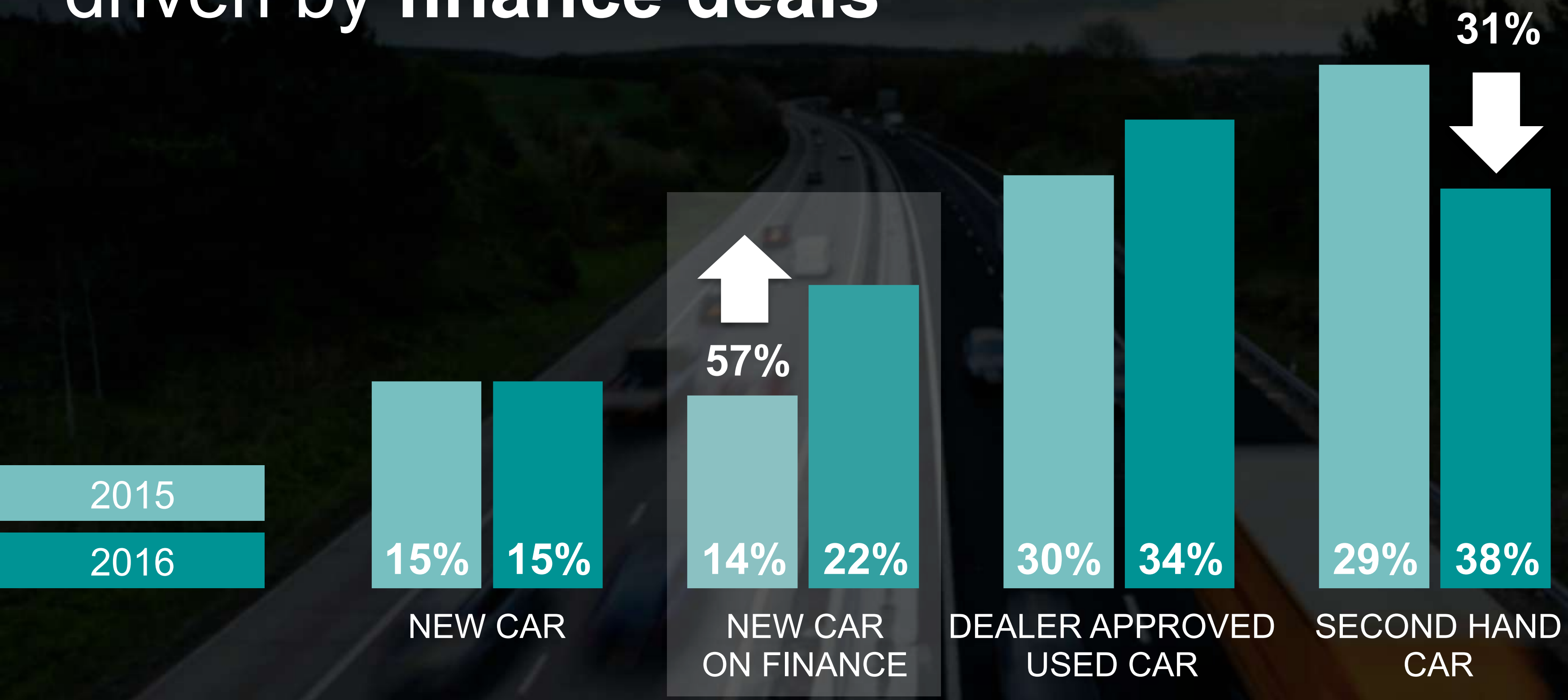
63%

Bought second hand cars in the last year

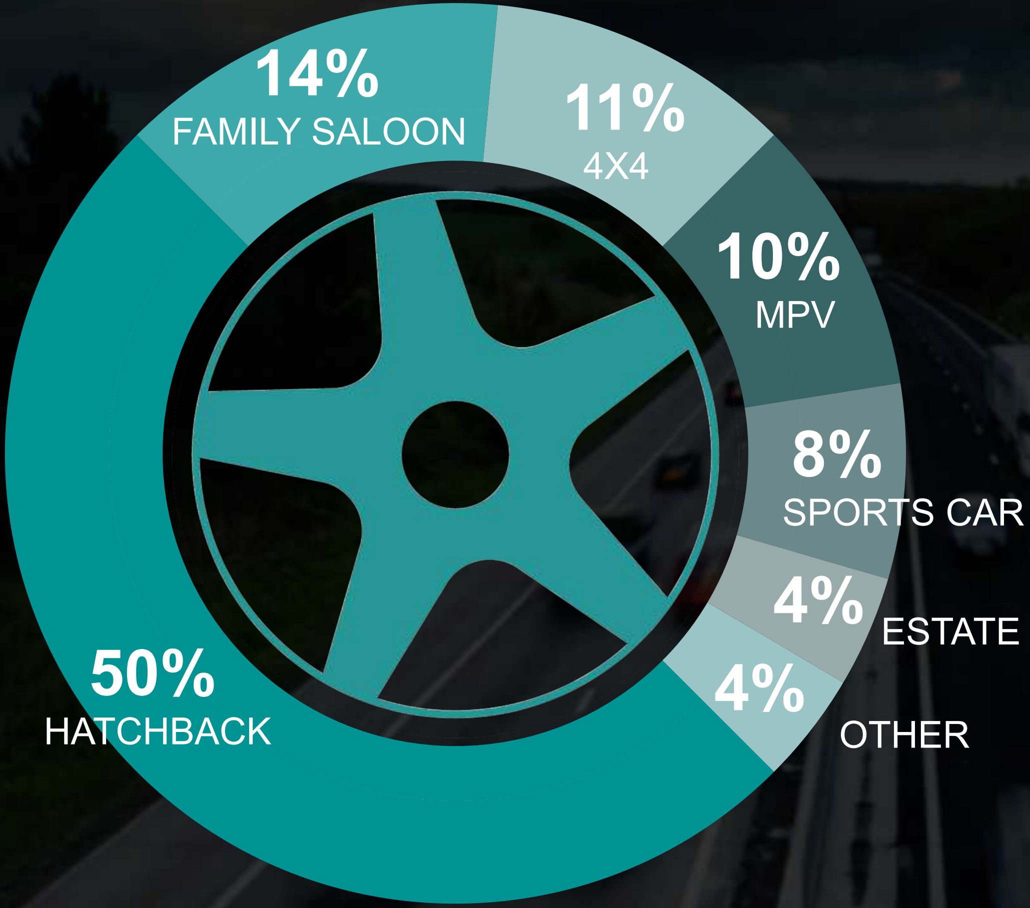
10% decrease YOY

Base n = 1,979

New car sales are being driven by **finance deals**



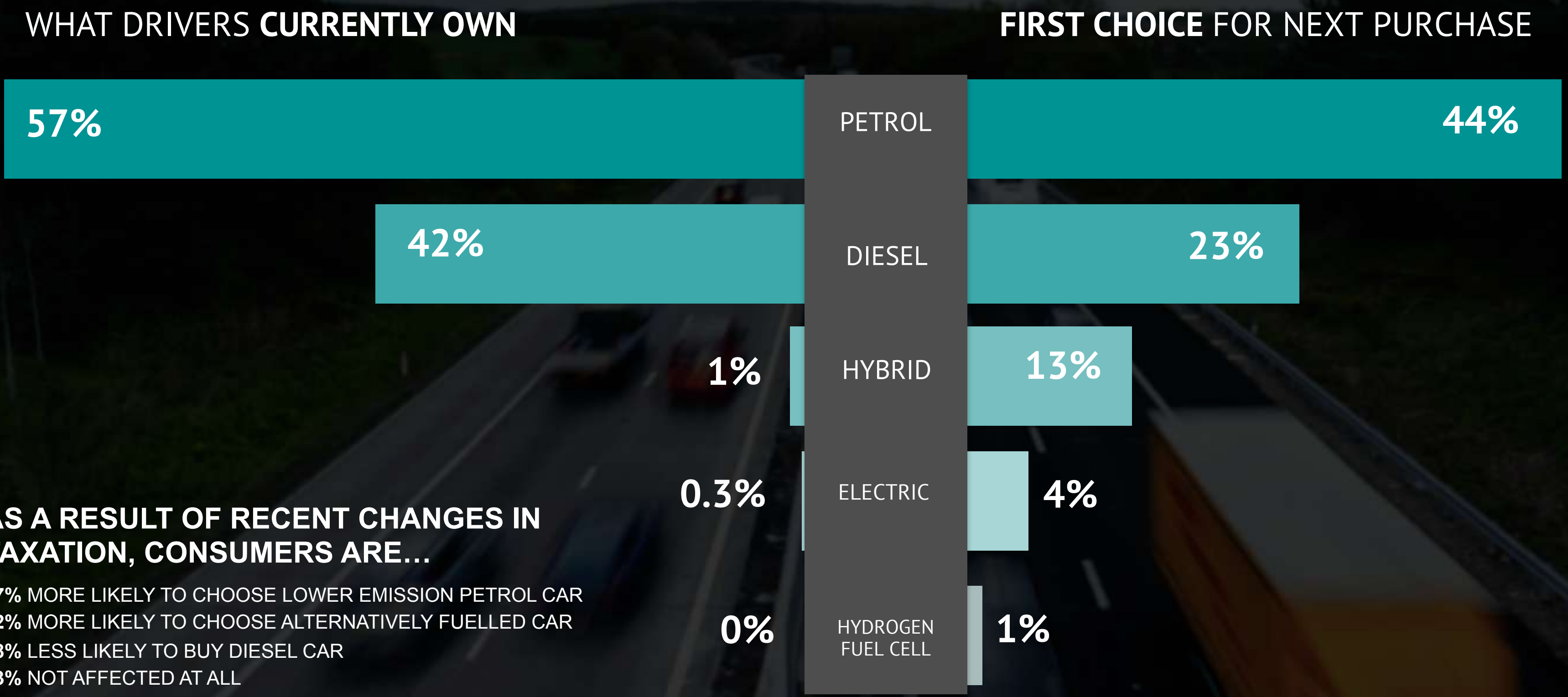
Base n = 1,979



HATCHBACK SALES take the lead for another year

Base n = 1,979

Taxation and regulation are driving a move towards **ALTERNATIVE FUEL SOURCES**



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

1. LOOK
2. BRAND
3. SIZE
4. SAFETY
5. EMISSIONS
6. AFTERSALES
7. REG 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**?

57%

AWARENESS

57% browsed for car inspiration on their mobile

59%

CONSIDERATION

59% researched and compared prices/specifications on their mobile

61%

INTENT

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

9%

PURCHASE

9% purchased a car on their mobile

23% go through the entire journey on their mobile and then **buy in a dealership**

9%

LOYALTY

9% explored aftersales on their mobile

Base n = 1,979

WEVE

AWARENESS

57% use their **mobile** to browse for car inspiration

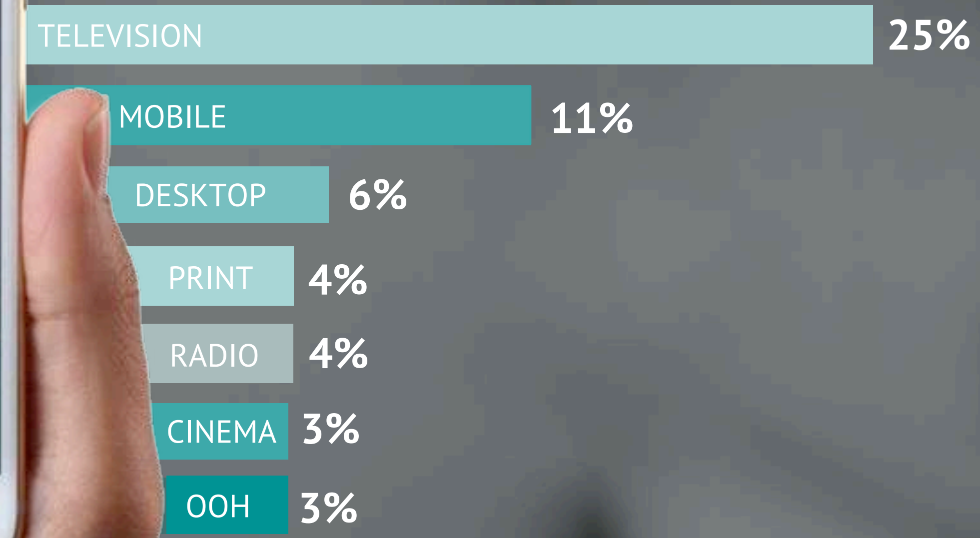
WEVE

TV, OOH + MOBILE drive highest ad **recall**

Thinking specifically of car advertisements, which of the following do you remember seeing recently?

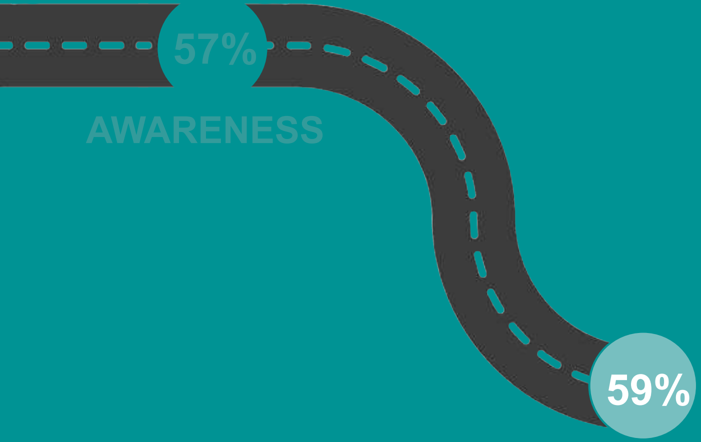
Base n = 1,979

...but **TV + MOBILE** are stronger in driving **action**



Base n = 1,979

CONSIDERATION



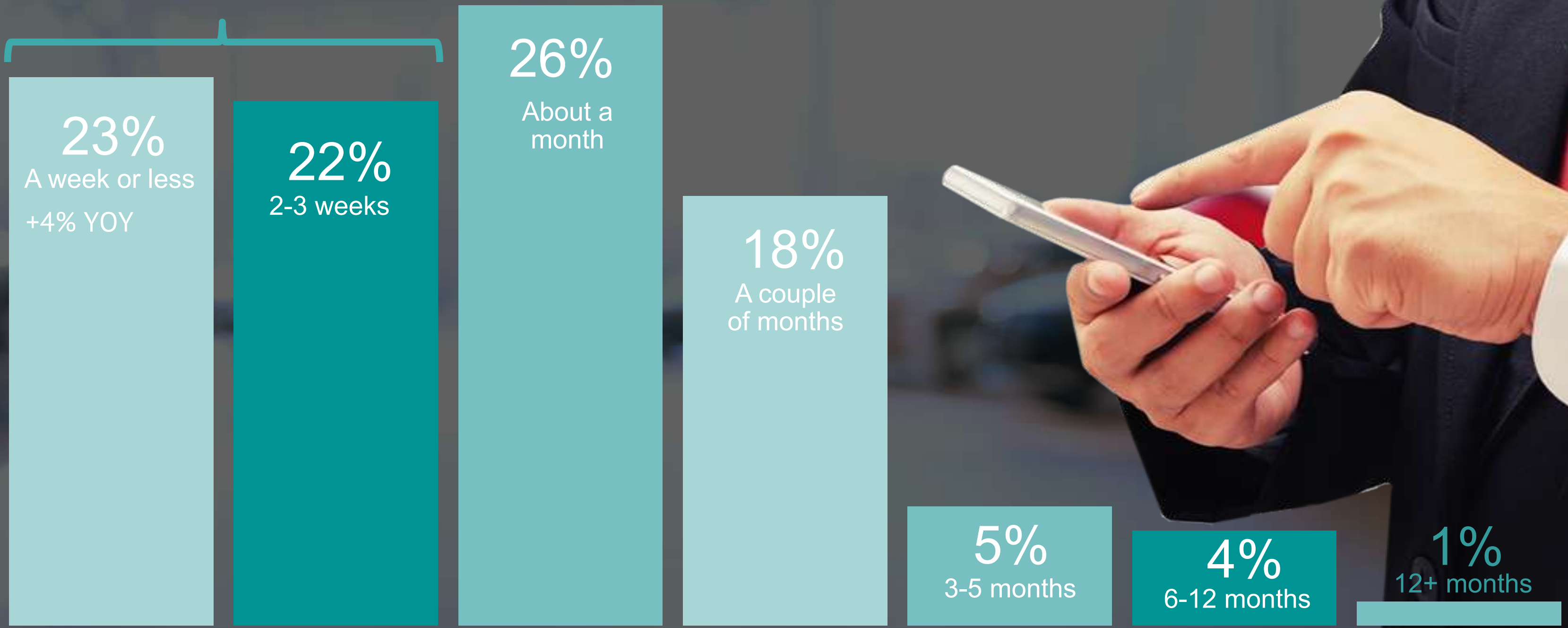
use their **mobile** to research and compare prices/specifications

WEVE

45% research a car in **under three weeks**

+3% YOY

Thinking about your last car, how long did you research before making a purchase?

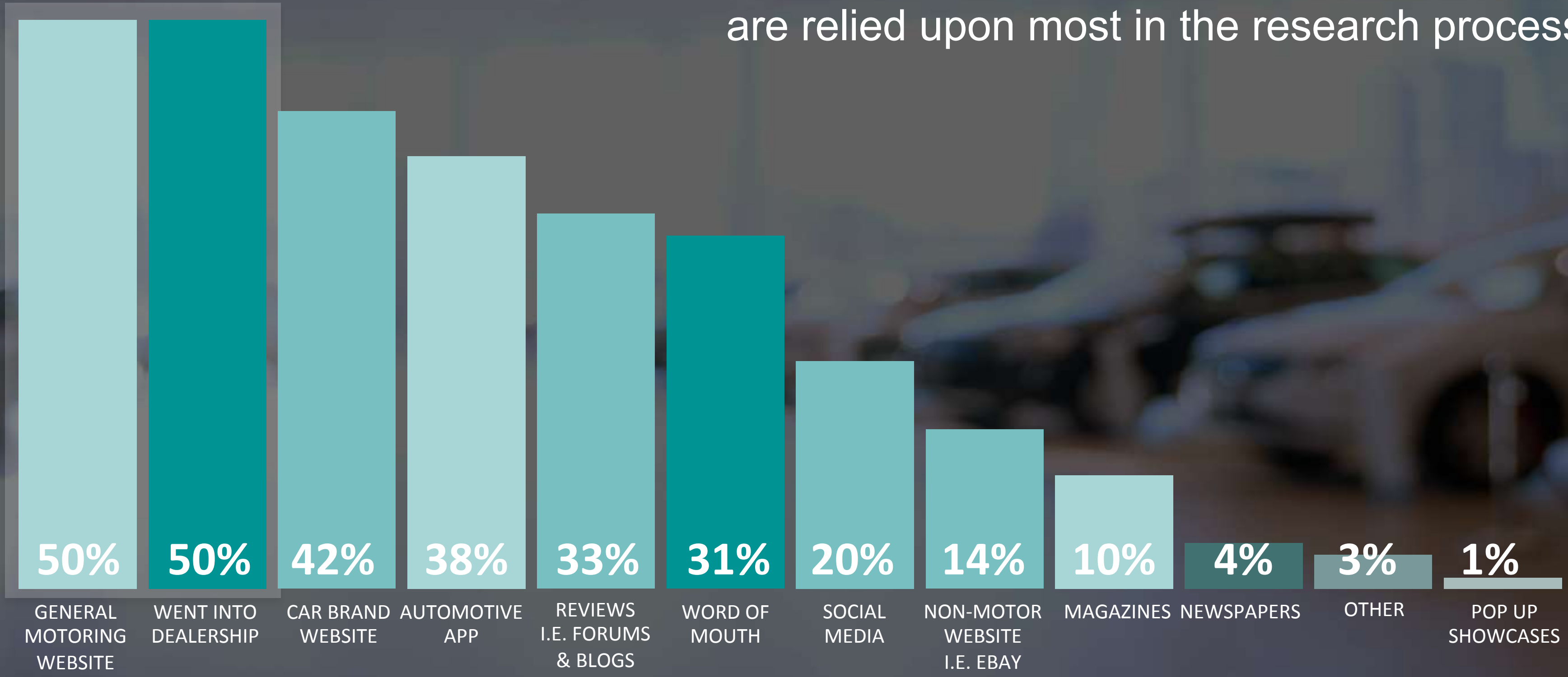


AVERAGE TIME SPENT RESEARCHING A CAR: **6 WEEKS** (- 1 week YOY)

Base n = 1,979

GENERAL MOTORING WEBSITES and DEALERSHIPS

are relied upon most in the research process



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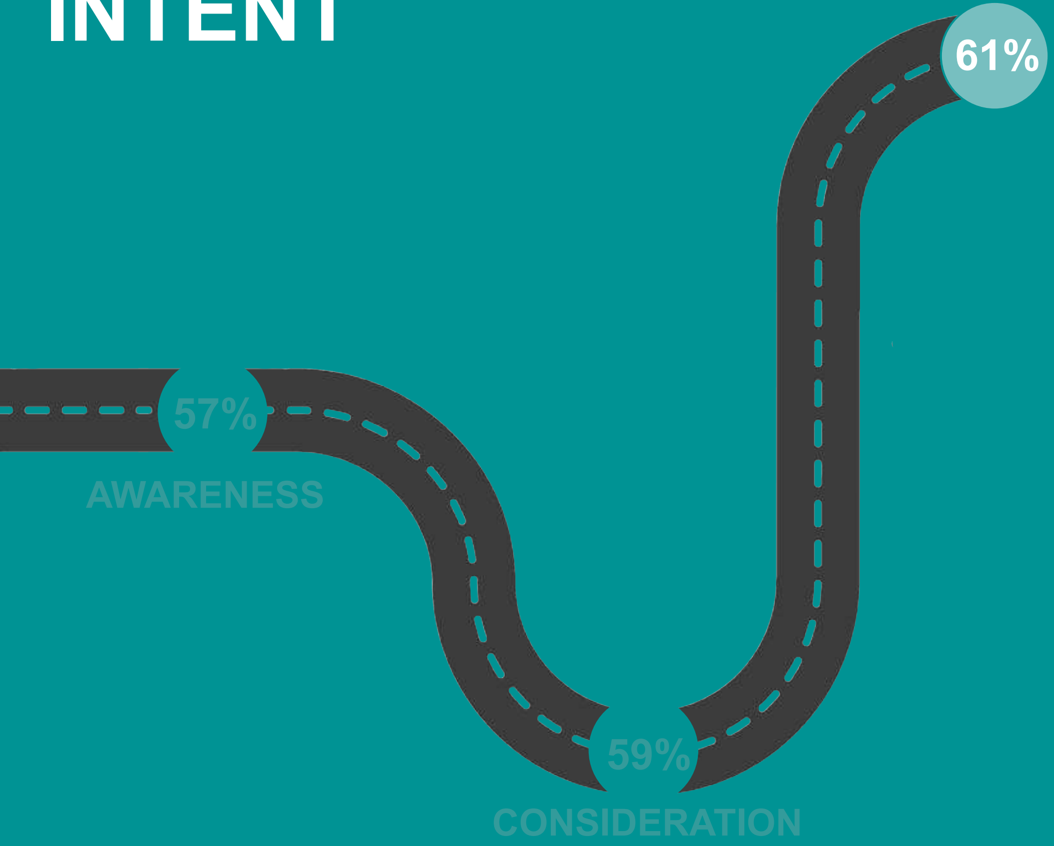
INTENT



use their **mobile** to book test drives, request brochures, and search for dealerships online

WEVE

The majority are **USING THEIR MOBILE** in the process

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?

Base n = 1,979

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

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%

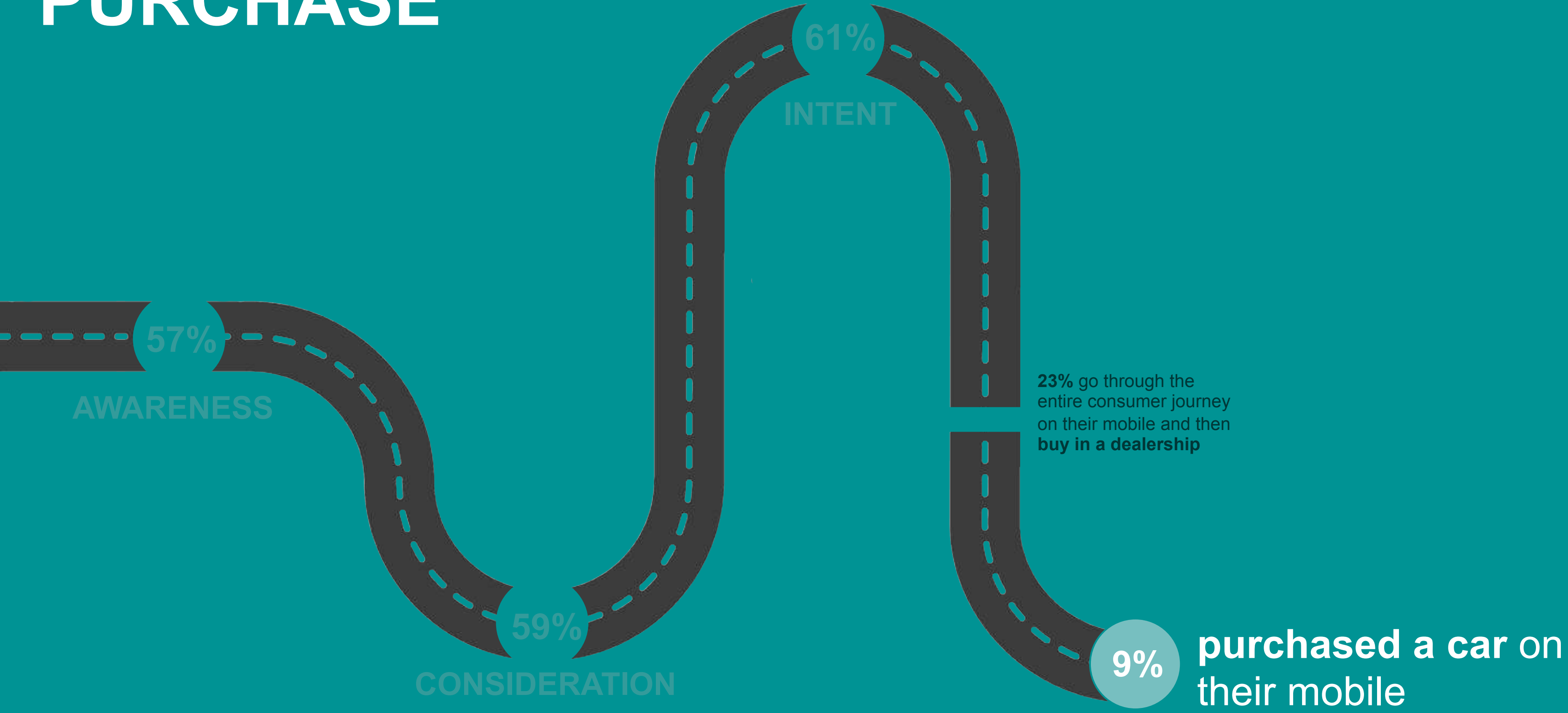
Through **small cell**, **cellular** and **WiFi data**, Weve can see **what they're doing on their phone** when in the dealership, from what **sites they're visiting** to **who they're calling**.

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

PURCHASE

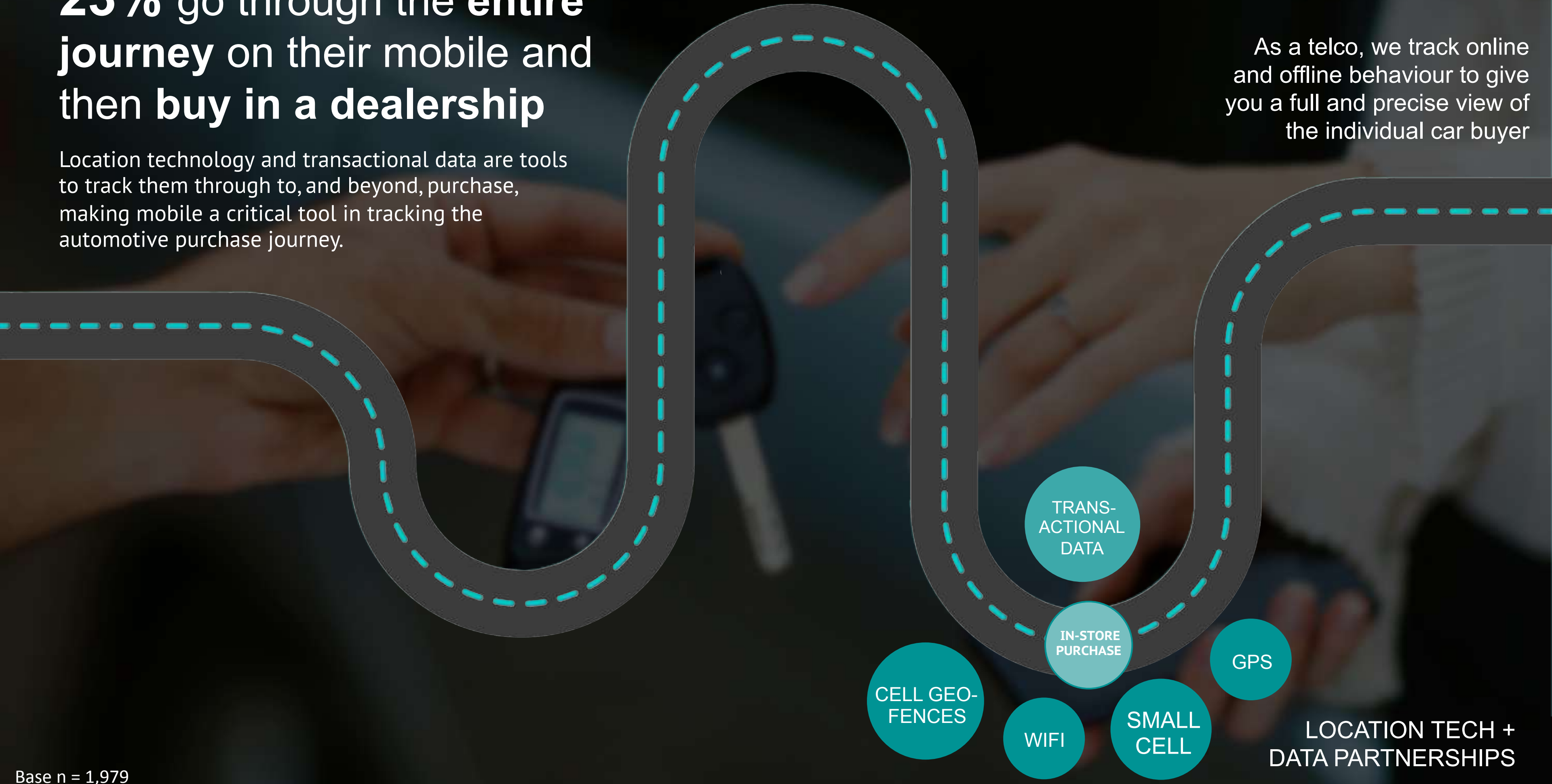


WEVE

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'

"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."

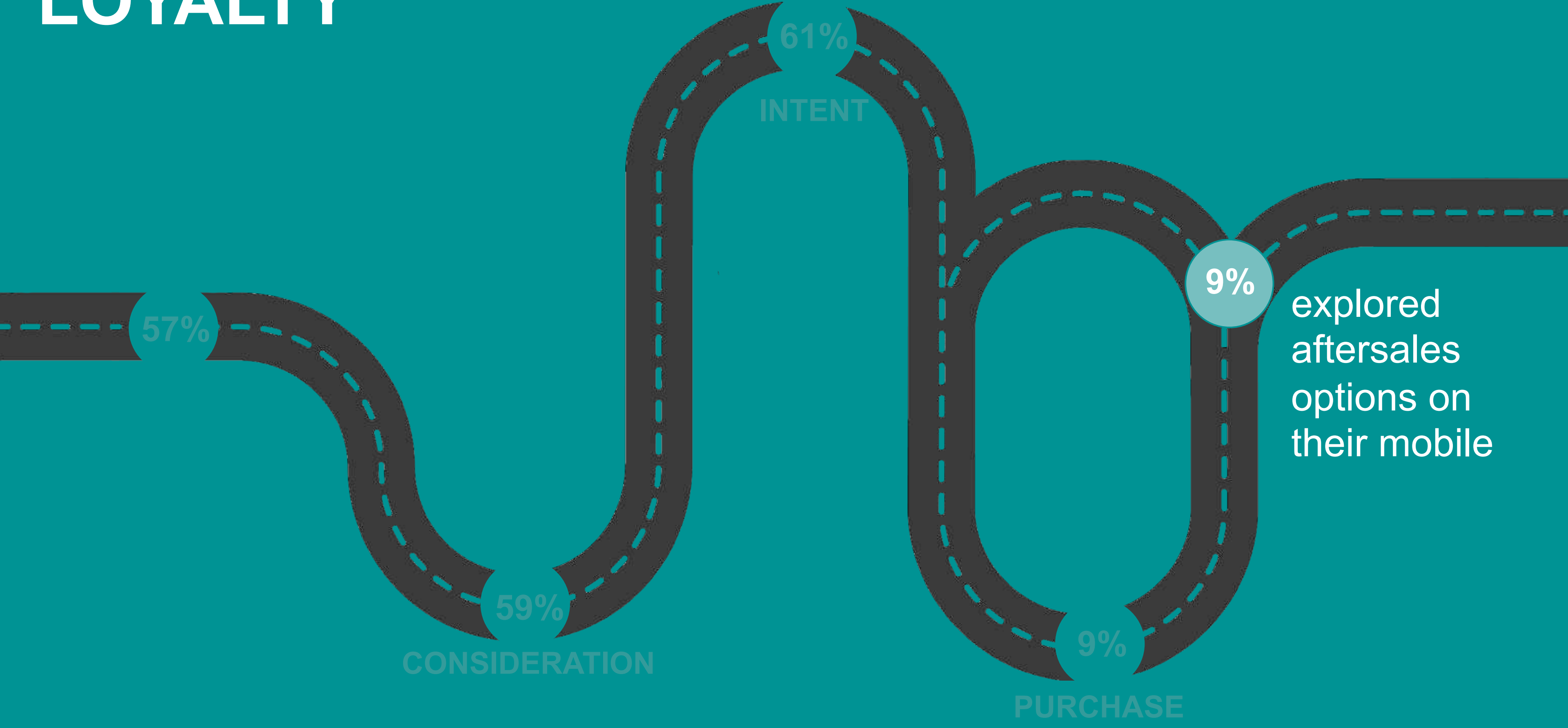
"An easy process that filters the car type, size, price etc. of the car that I need."

"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."

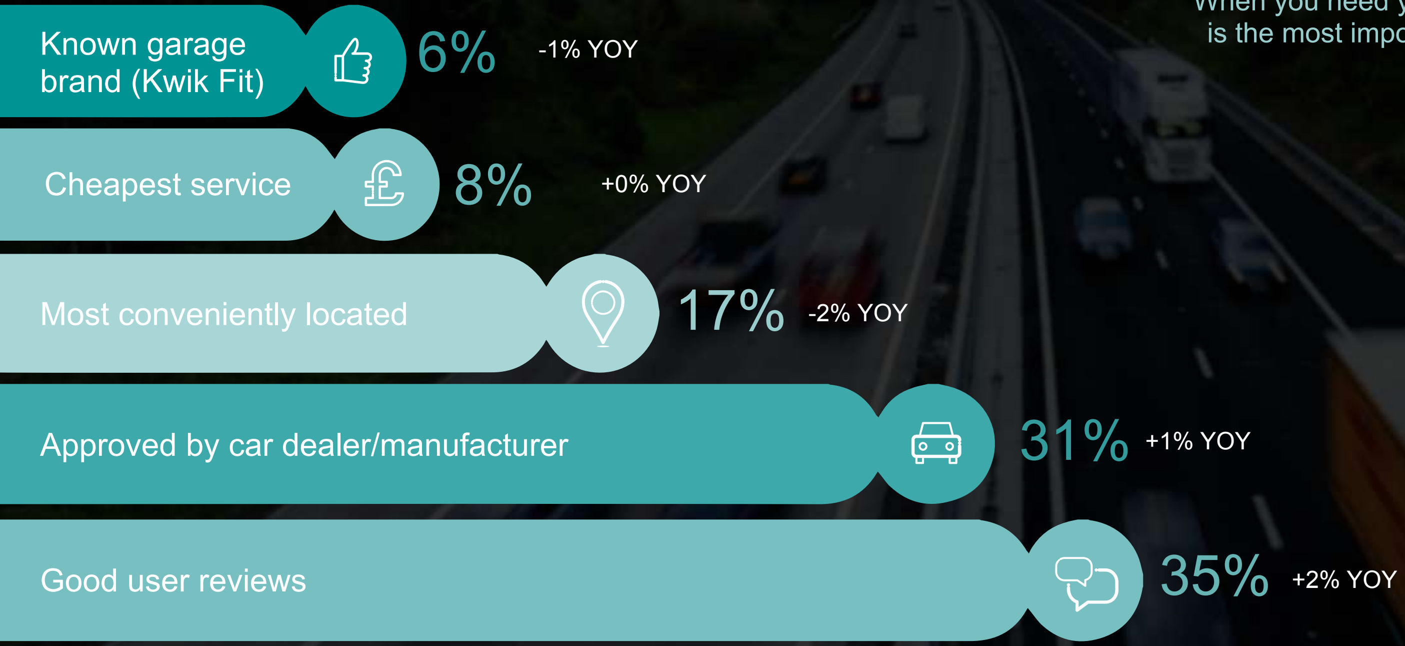
Base n = 1,979

LOYALTY


57%
59%
CONSIDERATION
61%
INTENT
9%
PURCHASE
9%
explored aftersales options 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?

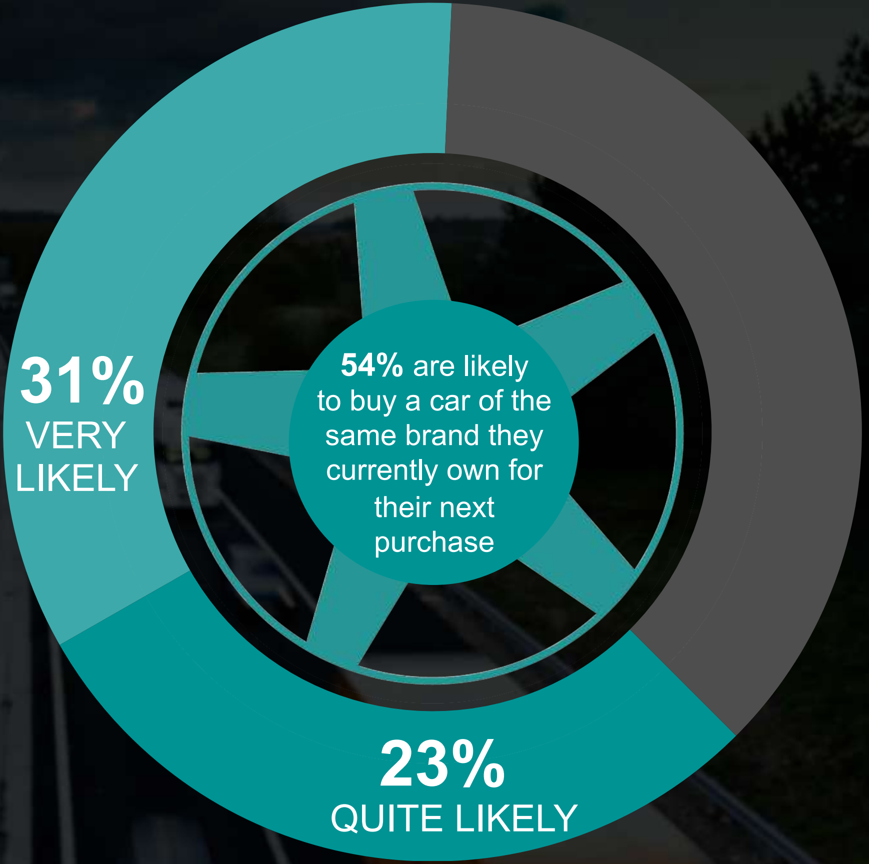


Base n = 1,979

What makes drivers **BRAND LOYAL?**

36%

Purchased the same brand as their previous car



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.

Base n = 1,979

WIDER INDUSTRY

Attitudes towards **driverless cars** are evolving

Driverless cars are as safe or safer than cars with human drivers

21%

I'd be happy to never drive again and let my car drive me

22%

I would trust driverless cars to get me to my destination safely

28%

48%
know a bit about driverless cars

31%
are very familiar with driverless cars

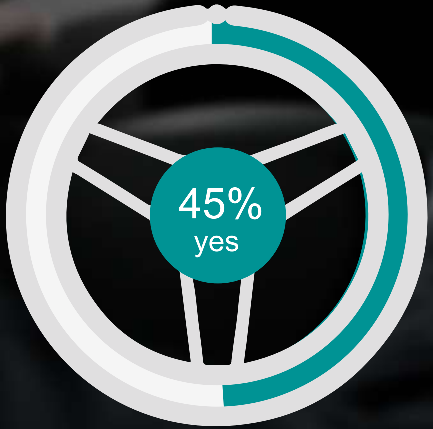
Base n = 1,979

The uses of **mobile connectivity** are wide

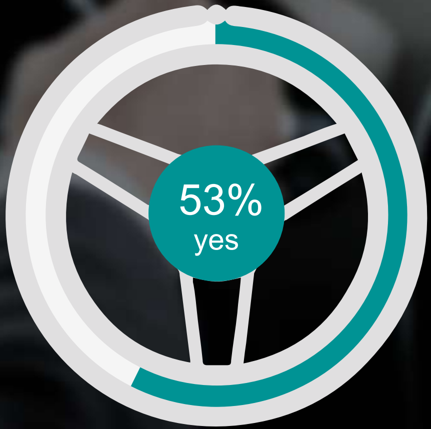
Base n = 1,979

Consumers are willing to **share their data** with **third parties**...

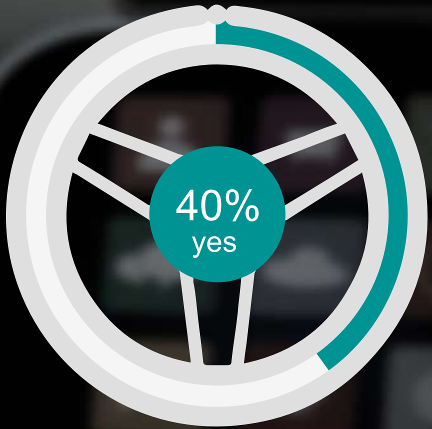
Driving data to your insurance company for reduced insurance costs?



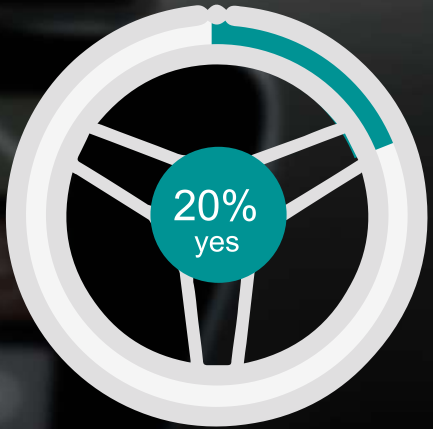
Data to your car manufacturer to help them design their future cars?



Location data to the government to help them choose where to upgrade road infrastructure?



Data on your speed to the government to track how fast you drive?



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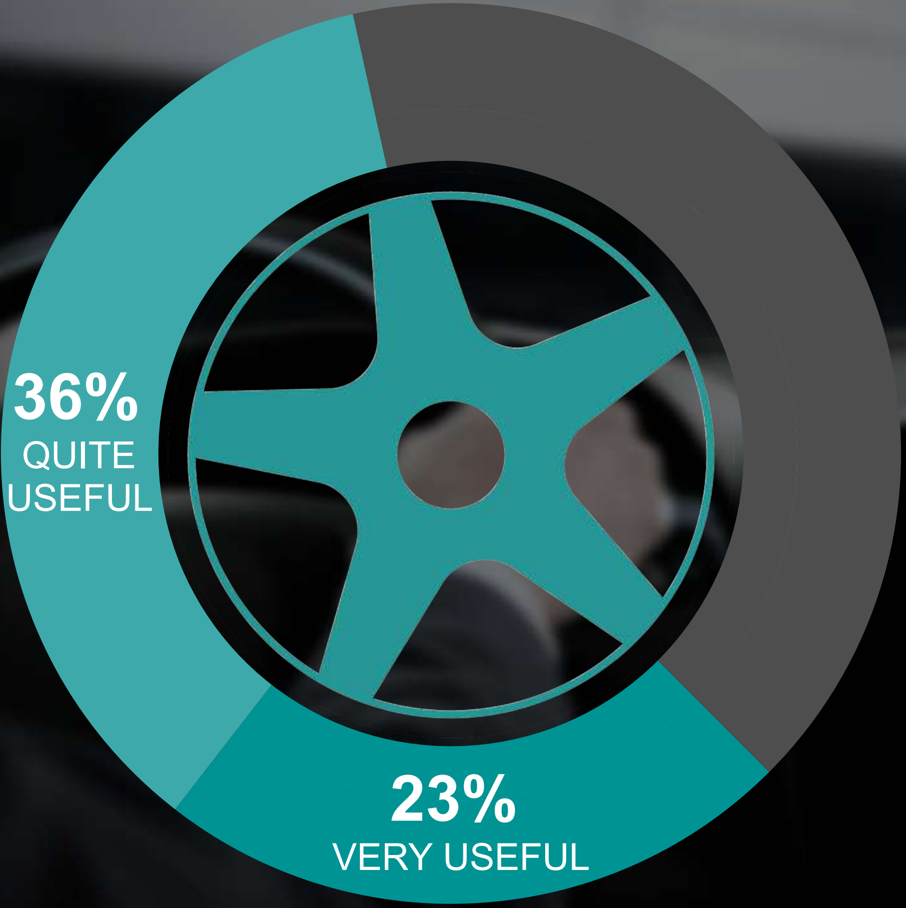
The **value exchange** extends into advertising



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

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

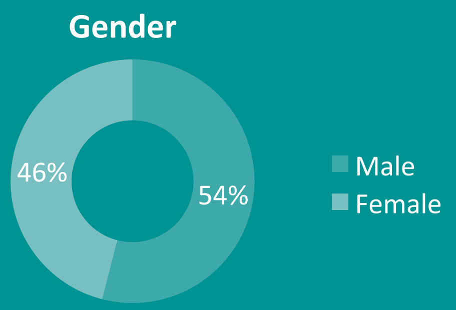
The path to purchase is getting shorter, so it's more important than ever to reach consumers at moments that most influence their decisions. In a highly involved and measured purchase like a car, mobile data plays a critical role in identifying and understanding consumer mindsets from the beginning of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

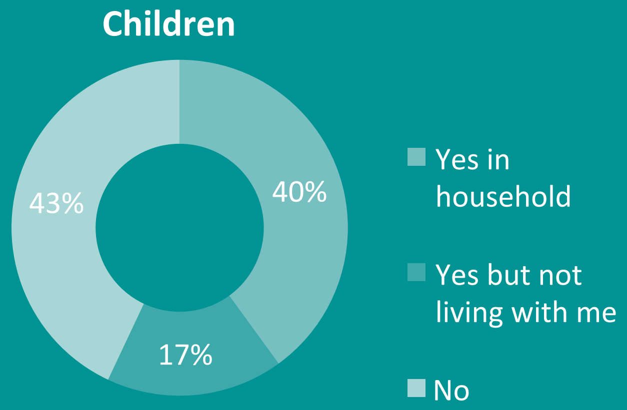
WEVE

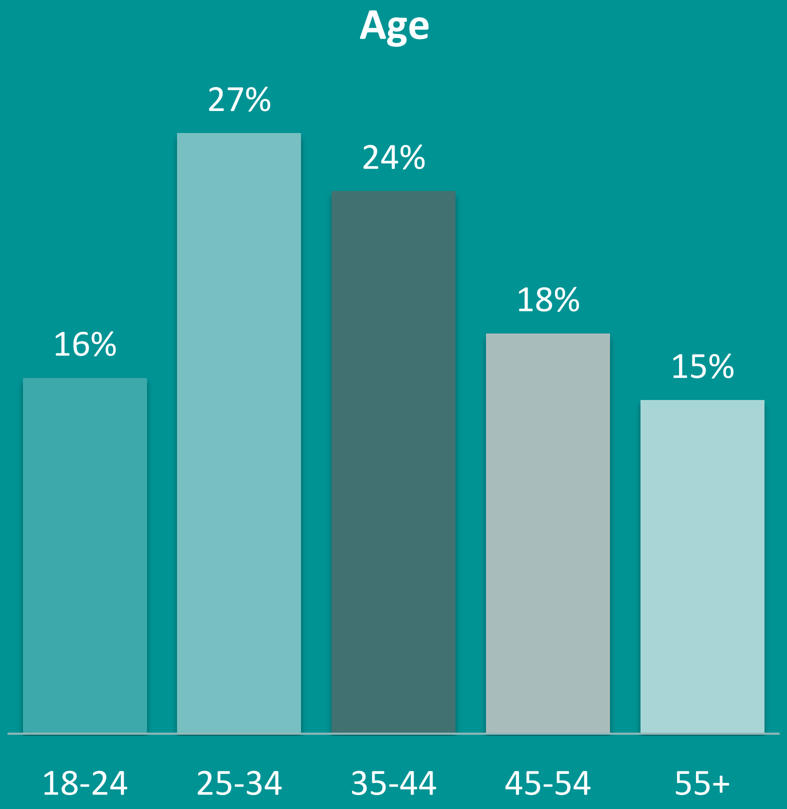
THE HUMAN INTELLIGENCE NETWORK

Timothea.Horwell@weve.com
Marketing & Research Manager

BASE DEMOGRAPHIC







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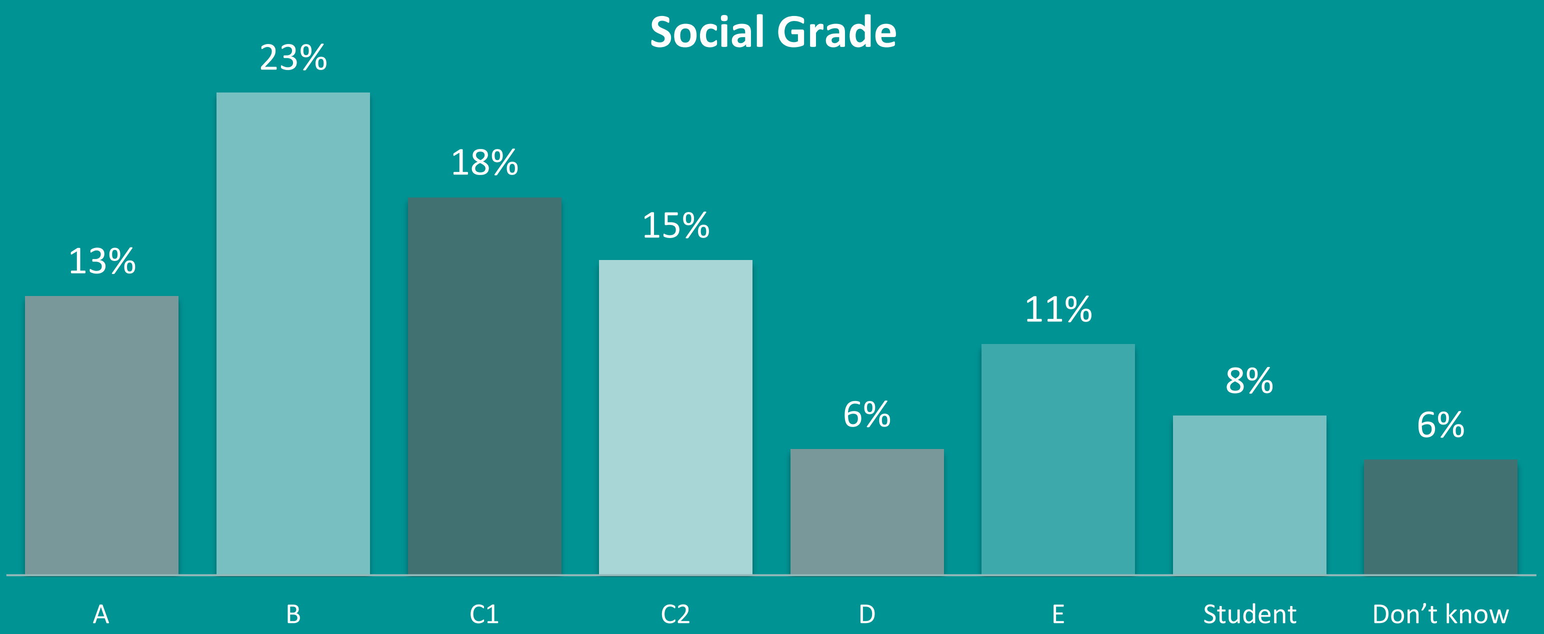

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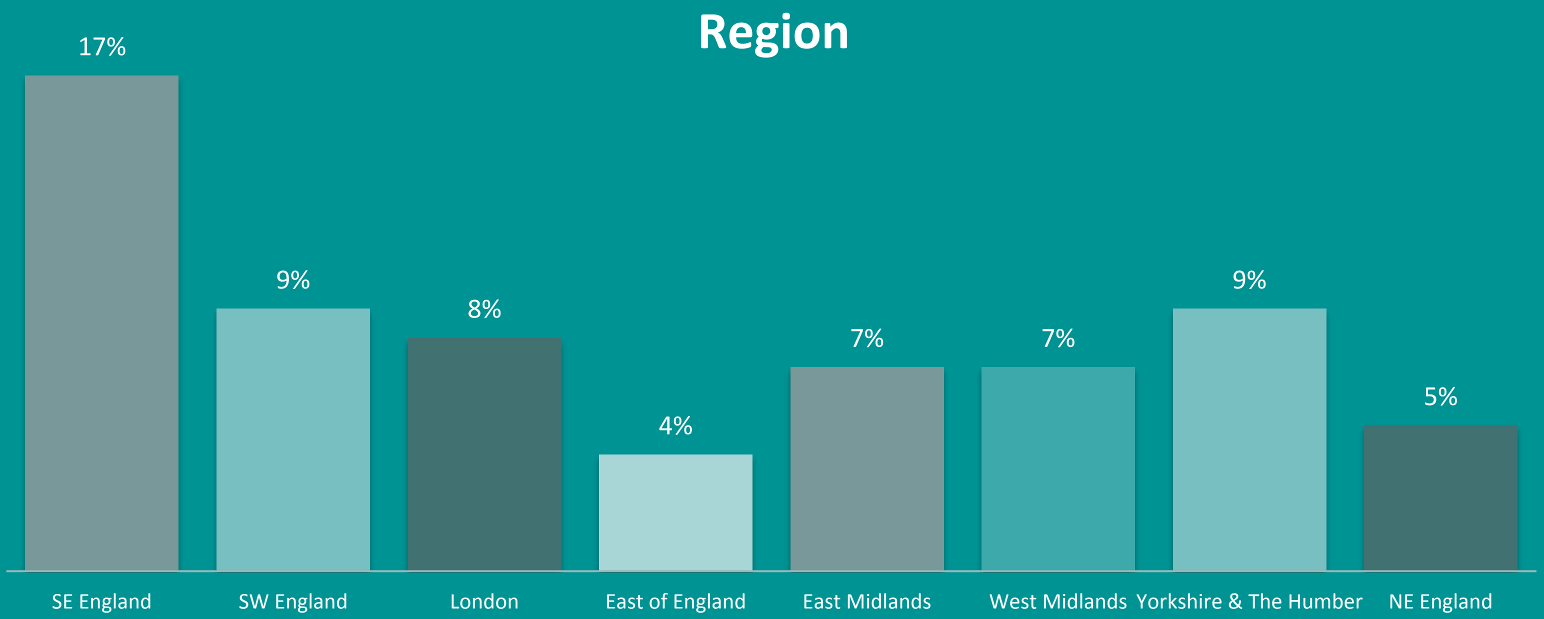

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