



The 5 Auto Shopping Moments Every Brand Must Own

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The average car shopper today makes just two dealership visits in the search for the perfect vehicle. That's because today car shoppers turn to mobile to research models, find deals, and get real-time advice. David Mogensen, Google's Head of YouTube Ads Product Marketing and former automotive marketer, shares how to tap into this new auto buying process.

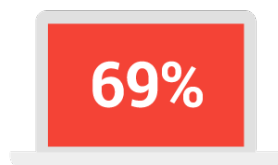
think with **Google**

Some of my fondest memories as a child were spent with my Dad, shopping for a new car. Going from dealership to dealership, climbing in and out of the vehicular jungle gyms perfectly arranged on the showroom floors.

When I went to work in the auto industry a decade later, I learned that these weren't just my wonder years. They were the golden age for the auto industry, too. They represent a time when people were loyal to brands and got their answers at the source — a local dealership.

My, how things have changed. Far from the daylong adventures of my youth, the average car purchaser today makes just two visits to dealerships.¹ Sparked by digital, and ignited by mobile, those indelible moments with my dad have been replaced by countless micro-moments — times when car shoppers turn to digital to help select the perfect vehicle for their needs.

TNS Media Consumption
Report



of people who used YouTube while buying a car were influenced by it — **more than TV, newspapers, or magazines.**

In these moments before they take a single step onto the polished floors of your showroom, car shoppers are making decisions and forming opinions by doing their own research online. It's essential that you be there and be useful in these moments, if you want to be one of the two visits to dealerships they make when ready to buy. Here are the five digital moments that matter most:



Which-car-is-best moments

Six out of ten car shoppers enter the market unsure which car to buy.² To help narrow their choices, many start by consulting someone they trust. This can come in the form of reaching out to that one friend we all have who is bizarrely obsessed with cars (a hat I proudly wear), by reading blogs or forums, or by searching for review sites like Edmunds, KBB, and Car and Driver.

No matter the source, data shows these early research moments are increasingly influenced by video. In fact, of people who used YouTube while buying a car, 69% were influenced by it — more than TV, newspapers or magazines.³ We've seen a huge increase in searches for car reviews on YouTube — everything from in-depth expert reviews from YouTube creators to more traditional industry reviewers that compare two models head-to-head in the same video. Auto review videos on YouTube have been watched more than 3M hours in the first 9 months of 2015, of which more than 1.2M were on mobile, more than 2X as many as last year.⁴



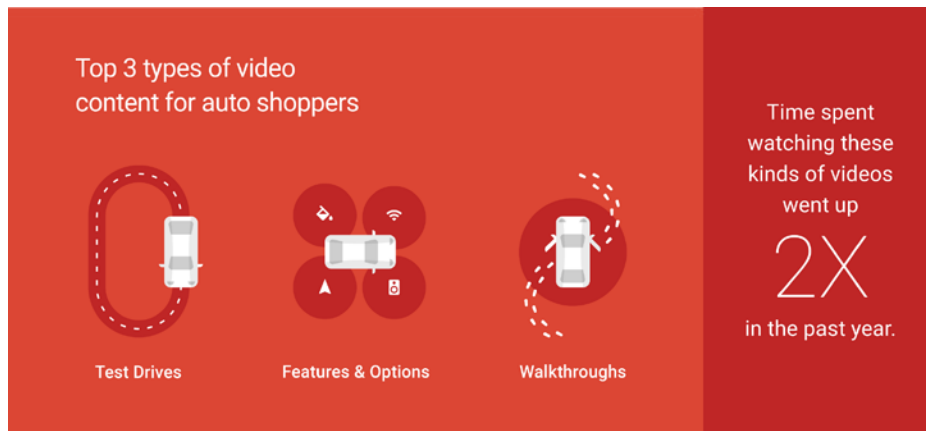
Is-it-right-for-me moments

At some point, a shopper needs a reality check: will this car fit my needs and my life? Information about practical considerations, like seating accommodations and the number of airbags, are the hallmark of this stage.

Historically, fuel efficiency has been a key factor at this stage, but as gas prices drop, interest in fuel efficiency has followed suit, decreasing since 2011.⁵ One of the areas we're seeing increased interest is hauling capacity. Trunk space and towing capacity search interest, for example, is up 15% and 30% respectively, year-over-year.⁶ And perhaps as a result of those gas savings, people are also looking to treat themselves a bit more. We've seen interest for luxury options on the rise. Search interest for features like panoramic sunroof and backup camera is up 31% and 23% respectively, year-over-year.⁷

Video usage ranks highly at this stage. Three of the top types of video content auto shoppers search for: vehicle test drives, highlights of features and options, and walkthroughs of the interior or exterior of the vehicle. Time spent watching these kinds of auto videos is up nearly 2X in the past year alone.⁸

Google Internal Data, January–September 2015 vs. January–September 2014, United States, Classification as a "car review," "what's in my car," or "car tour" video was based on public data such as headlines, tags, etc., and may not account for every such video available on YouTube.



On mobile, sometimes a still image best meets the needs of the moment. We found photos help people explore interior and exterior options and features. Search interest for "pictures of [automotive brand]" is up 37% year-over-year.⁹ Perhaps sparked by what people see out on the road or in

parking lots, 80% of these searches are happening on mobile.¹⁰

It's also at this stage where manufacturer websites fill a crucial role, helping shoppers understand various packages, equipment options, and helping them build 'their own' vehicles with configurators. Even on smaller mobile screens, configuration searches are 3X higher than last year.¹¹



Can-I-afford-it moments

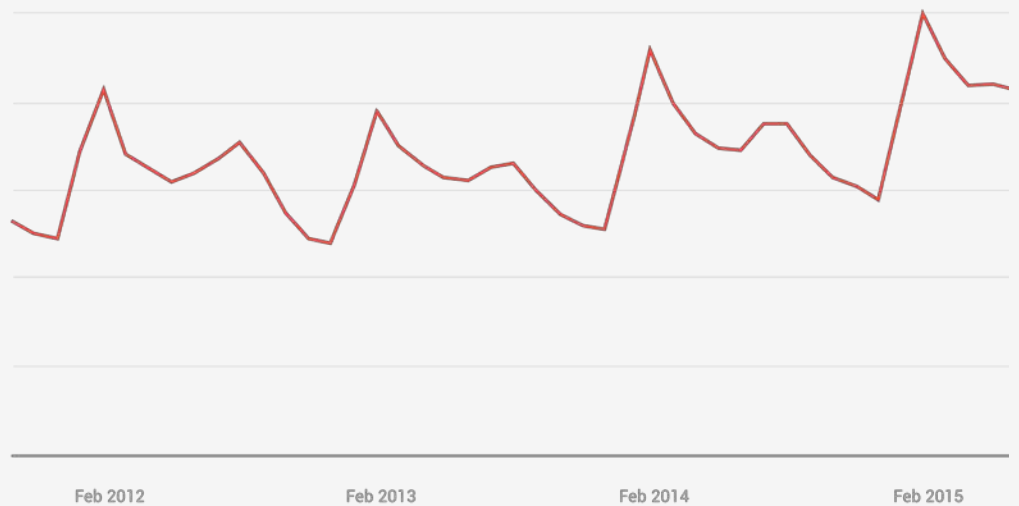
Once consumers can imagine owning a particular vehicle, they need to know if they can afford it. And again, people are grabbing their smartphones to find a fast answer. Search interest for MSRP & list prices is at its highest levels ever, growing 25% in the past year¹², driven in large part by mobile, which accounts for 70% of these searches.¹³

For many shoppers, the value of their current car is just as important as the price of the new one. Search interest in trade-in value was at record levels this Summer — up 17% in July.¹⁴ In fact, we are seeing more trade-in interest than we saw during the Cash for Clunkers major push in 2009.¹⁵ As of August 2015, more than 50% of these searches were on mobile.¹⁶

Seasonality also plays an important role. Every February, for instance, we see a spike in search interest for cars "for sale under [given amount]," possibly due to people anticipating a big tax return.¹⁷

Summer is another important seasonal moment. When the temperatures rise, so does interest in car shopping. Search interest for “lease deals” peaked this summer, up 20% compared to last year.¹⁸

Search Interest for:
“cars for sale under \$ [x amount]”



● Search Interest

Source: Google Trends United States. Jan 2004-Sept 2015



Where-should-I-buy-it moments

Even as the majority of the car shopping process moves online, the visit

to the nearby car dealership remains a crucial step in the journey. In fact, search interest for “car dealerships near me” has doubled in the past year.¹⁹ And of those that used their mobile devices as part of the purchase process, one in three located or called a dealer on their mobile device.²⁰

Beyond the “where,” shoppers also look for the “when” and “what.” Search interest for “are dealers open Sunday,” for example, is popular, particularly on mobile phones (making up 84% of those searches).²¹ Search interest for inventory, to find if the right car is in stock, is growing more than four times faster than overall auto search interest.²² And while websites and apps can often answer those questions, sometimes a good old fashioned phone call is still the way to go — with search interest in dealer phone numbers up over 78% in the past year²³ (the majority of which, not surprisingly, happen on mobile²⁴).

Automotive Shopper Path
to Purchase, Millward
Brown Digital and Polk,
September 2015



1 in 3

shoppers that used their mobile devices
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Finally, shoppers look at “which.” Which dealership is going to deliver the best experience. Just as more car shopping happens on weekends, search for dealership reviews spike on the weekends as well. Whereas dealership review searches happen more on desktop during the week, mobile becomes the preferred method on weekends, making up 56% of searches.²⁵



Am-I-getting-a-deal moments

OK. The deal just got real. The shoppers are on the lot. And they know what they want. But they need to know they're getting a fair deal. In other words, this stage is all about that game of poker we all play as consumers, sitting across the laminate desk, looking at pictures of the sales person's kids, asking ourselves "could someone with kids that adorable NOT be giving me the best possible price?"

Google Internal Data, August 2014 and August 2015, United States. Aggregated anonymized internal data from a sample of U.S. users that have turned on Location History. Queries were considered as being "from" a location if they occurred within one hour of a user visit to a car dealership.



Mobile searches from dealership lots **increased 46%** in the last year.

Where questions like those used to be a matter of going with our gut, today they are about going with our phone. Mobile searches from dealership lots increased 46% in the last year.²⁶ Today, half of all car shoppers with mobile devices use their smartphones while at the dealership.²⁷ The top action people perform with their phones while on the lot, not surprisingly, is confirming that they are getting a good price on a vehicle.²⁸ Searches for Kelley Blue Book and competing dealers occur more often when at the dealership.²⁹

Master These Digital Moments Changing the Auto Industry

This is a time of increasing opportunity to connect with auto shoppers. They're researching more and adding more and more vehicles to their consideration lists. The first brand searched is the same brand purchased only 22% of the time.³⁰ But, more often than not, your chance to win over a shopper isn't just happening in person, it's happening online — often on a smartphone. Here are three things to keep in mind to make sure it's your brand and dealership they choose when they're ready to buy.

BE THERE: With the majority of the car shopping process moving online, it's crucial that you be there when and where people are looking. Try going through each of the above steps yourself, as though you were in the market for a new car. Are you there at each step? Increasingly, that means being there when people are on the go. One in four car purchasers turn to mobile EVERY DAY to research vehicles.³¹

BE USEFUL: Beyond being there, consider how you can best meet people's needs at each step. If you work at a dealership, help make it easy for customers to do the things they do most, like value their trade-in, search for prices and inventory, or find your store. If you're a manufacturer, help when people are looking for videos and images of your cars, exploring configurations and building their own, or comparing your brand to competitive vehicles. And don't forget to make it all as easy on mobile as it is on desktop.

BE QUICK: Mobile phones have made us all impatient. We expect to find anything we need at the tips of our fingers. As a result, marketing cars is a bit like playing Jeopardy. It's not just about who has the right

answer. It's also about who answers it the quickest. And the stakes for getting it wrong are high. If you aren't there with the right answer, the moment shoppers are looking, chances are someone else will be.

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