

# The Drive to Decide

Auto Gearshift Study 2017



More digital consumers open for the brands to influence

Growing dependence of online engines to look for dealership information

Increasing influence of online on car purchase decision

First time buyers' research patterns and behaviour differs from repeat buyers

Accelerating influence of online video in the car purchase process

The big shift towards more evolving in consumer thinking/behaviour

Google KANTAR TNS.

# One change can bring about another...

Lifestyle needs can trigger buyers to decide that it's time for something new



**64%**

Financial situation  
improved



**53%**

Growing family



**20%**

New or  
changed job



**15%**

Moved to a  
new place



**12%**

Started working  
on a degree

# 68%

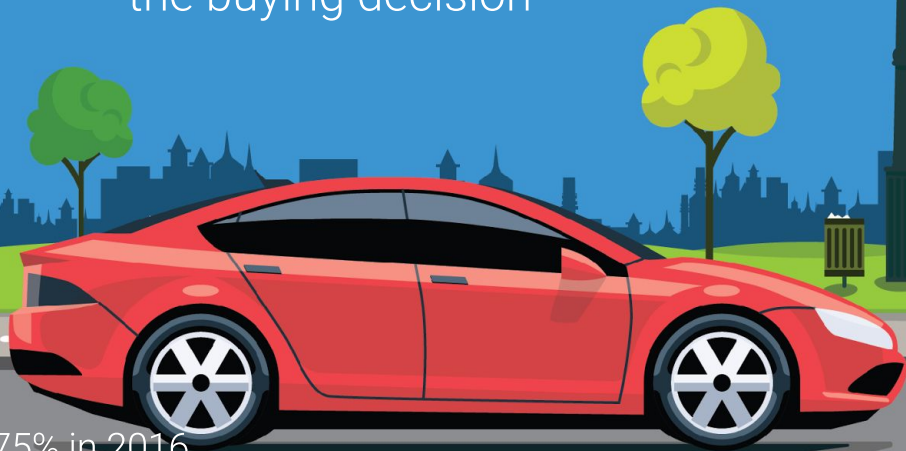
of car buyers start their research without any idea about the car they want to purchase



55% in 2016

# 89%

Aggregated impact of  
online touchpoints on  
the buying decision

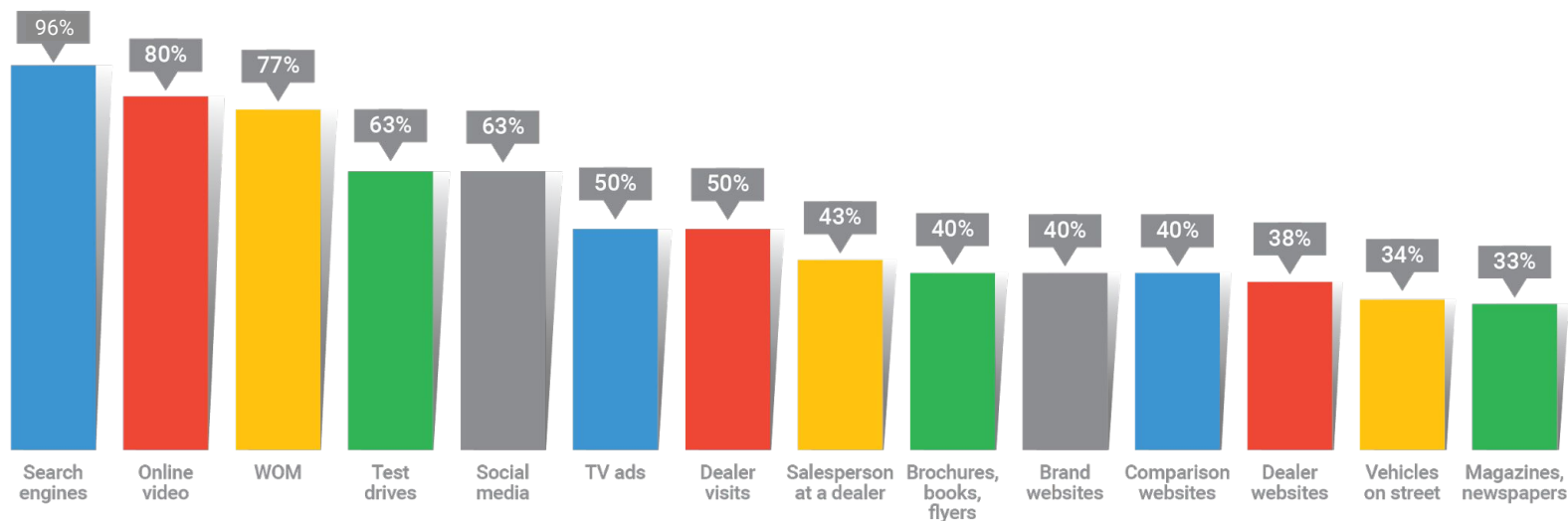


75% in 2016

Google KANTAR TNS.

# Search is most commonly used among all sources

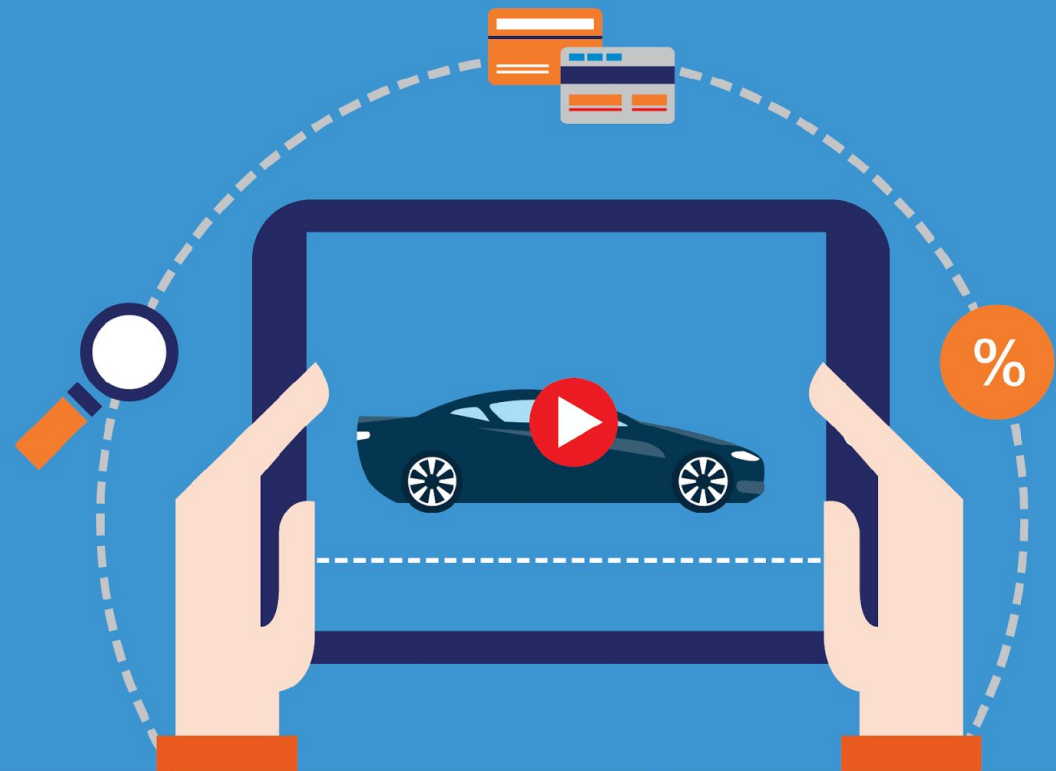
Percent of touch points used by all buyers – online, offline or in-person – used at any time until the final decision



# 80%

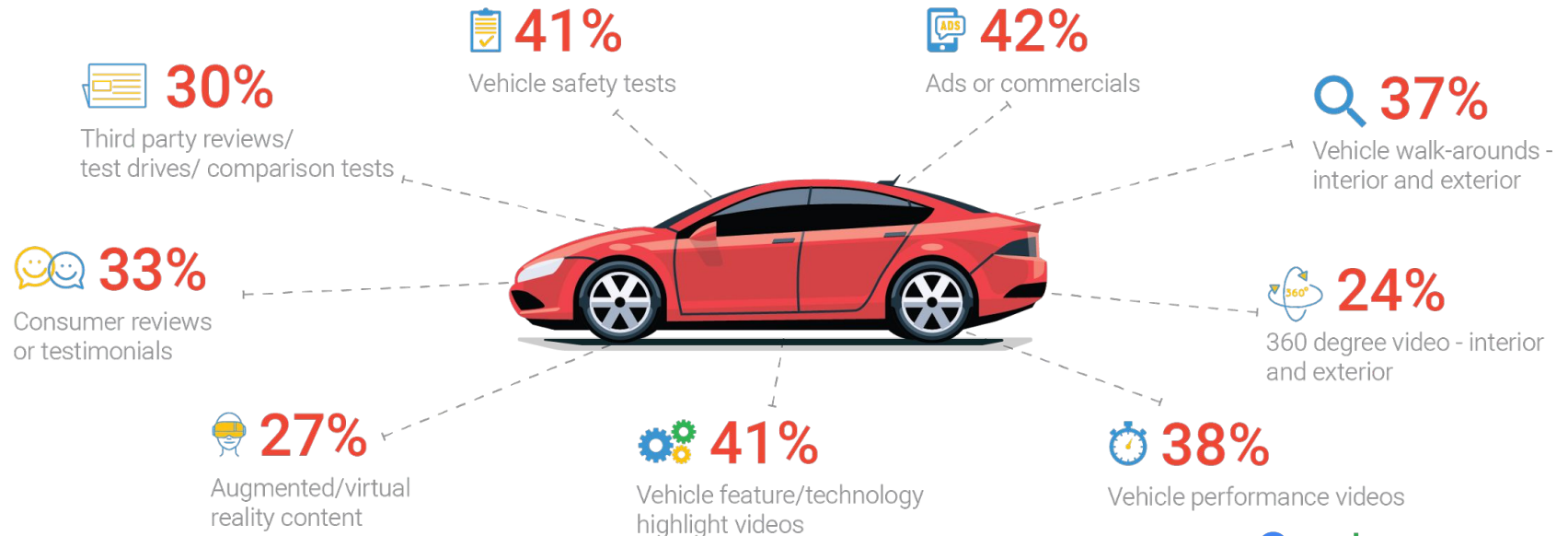
Car buyers used online video during their purchase process

43% in 2016



# Videos help to **explore vehicles** from different perspectives

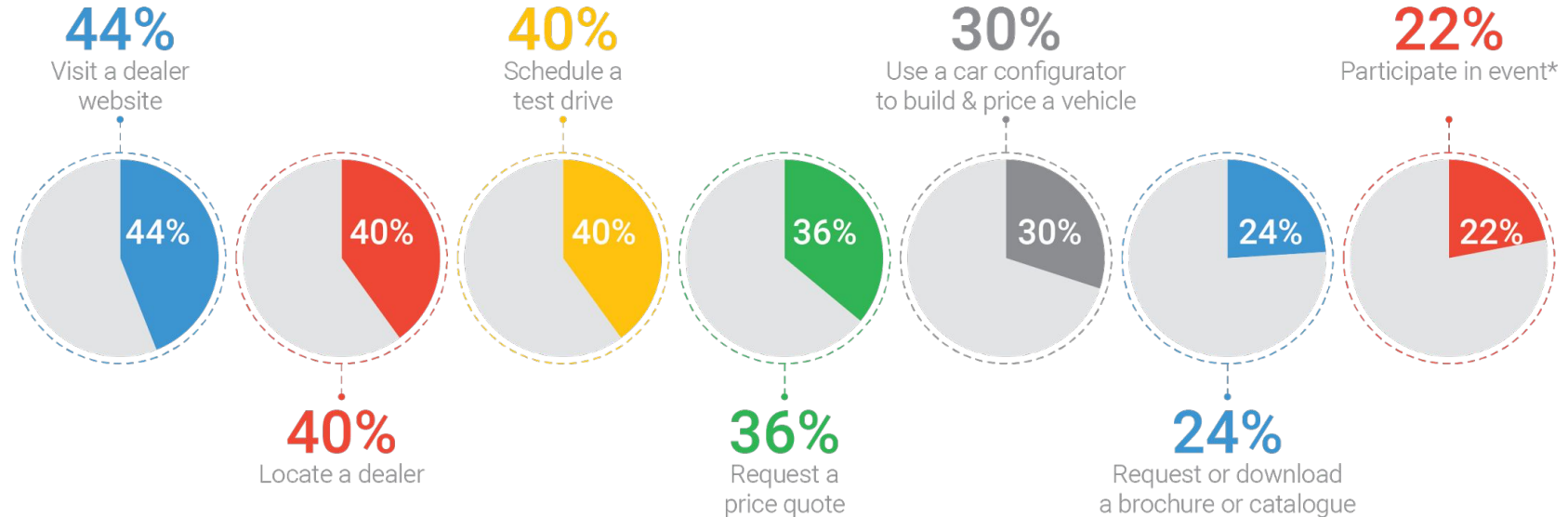
Type of videos watched before deciding about a new car





# Online video creates signals of intent

**79%** Actively did a follow-up action



# Online video helps car buyers narrow down their options

Video watchers.....

**53%** ... used online video to narrow down their consideration set

**38%** ... used online video to expand their consideration set



# Online video also has the potential replacement for a test drive

Video watchers.....

**19%** ... used online video to save trouble of going to test drive



# Online video is an influencer

Video watchers.....

# 81%

said that online video  
introduced a vehicle  
previously not considered



# Online video is an influencer

Video watchers.....



81%

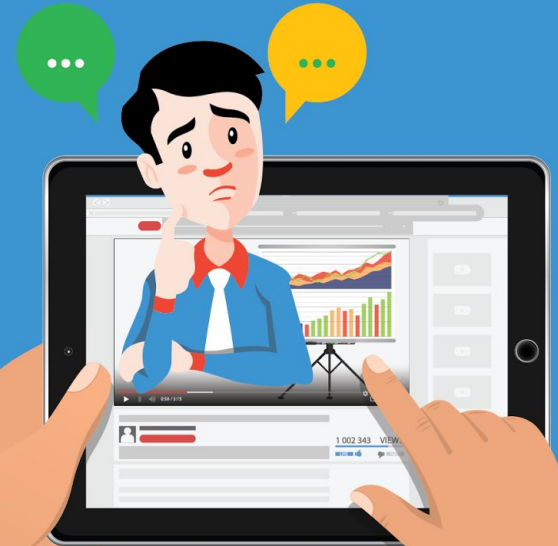
New Car Buyers



87%

Undecided Buyers

said that online video introduced a vehicle  
previously not considered



# Online video is an influencer

Video watchers.....

# 75%

said that online video positively  
changed their mind about a car  
or manufacturer



# Online video has a stronger impact on undecided buyers

Online video positively changed mind about car or manufacturer



# 75%

New Car Buyers



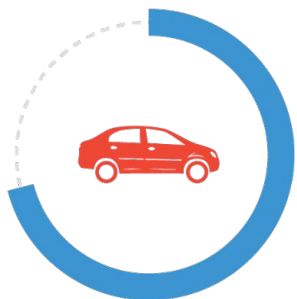
# 80%

Undecided Buyers

said that online video positively changed their mind about a car or manufacturer

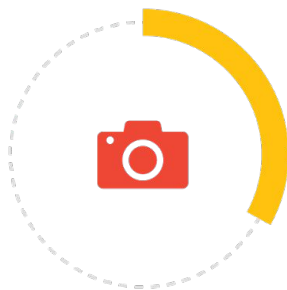


# Manufacturer's content is most relevant to the auto shopper



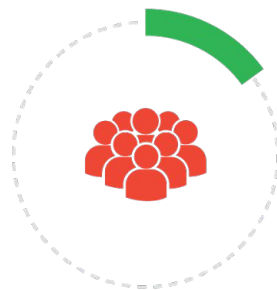
**71%**

Watched videos professionally produced by vehicle manufacturer



**33%**

Watched videos professionally produced by independent 3rd party



**15%**

Watched amateur videos produced by private persons





# Can a **360° Video** potentially replace a test drive?



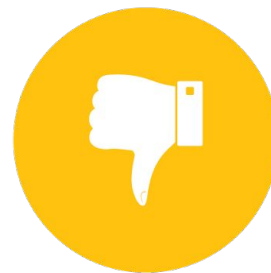
**71%**

Could convince  
me to buy without  
test drive



**17%**

Probably not  
convince me to buy  
without test drive



**15%**

Video could  
never replace a  
test drive

# Can a **Virtual Reality** potentially replace a test drive?



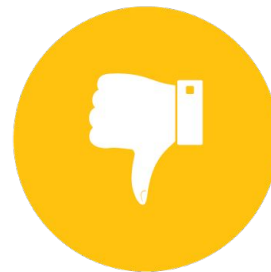
**68%**

Could convince  
me to buy without  
test drive



**18%**

Probably not  
convince me to buy  
without test drive



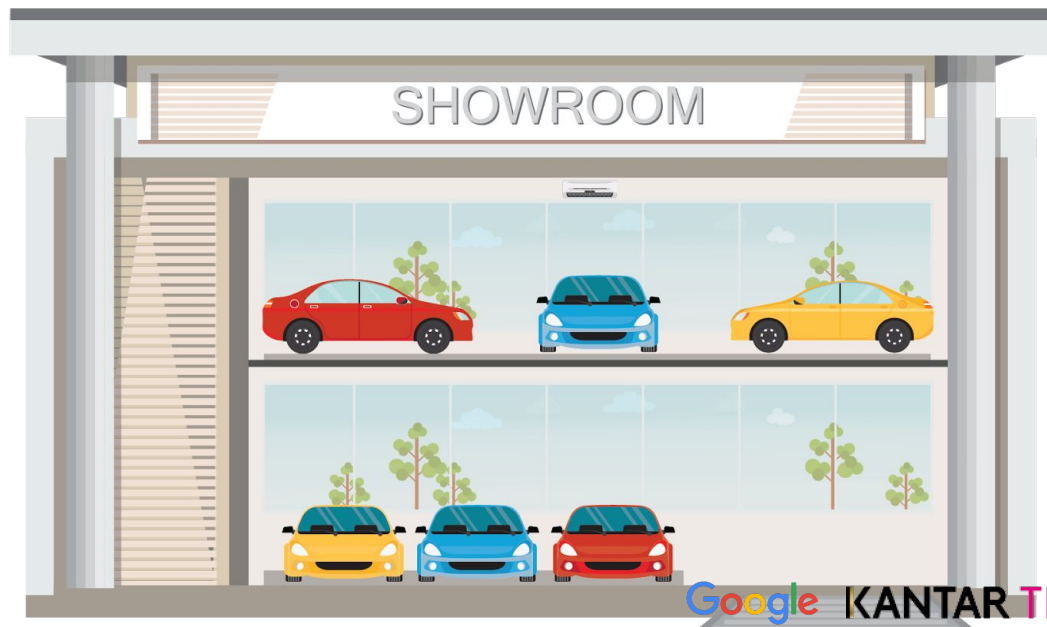
**14%**

Video could  
never replace a  
test drive

Many **offline buyers** find their dealers online...

**2 in 3**

researched online  
to find their dealer



...and of those who **found it online**,  
many did so via search



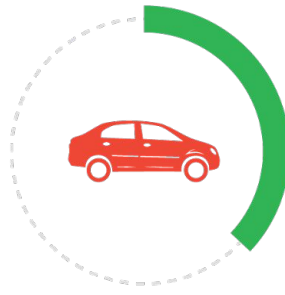
**64%**

found dealer via  
search engine



**47%**

found dealer via  
dealer's website



**37%**

found dealer via  
website of make



# 90%

Car Buyers take utmost  
2 test drives



# 2 in 3

Car buyers visited  
**utmost 2** dealerships

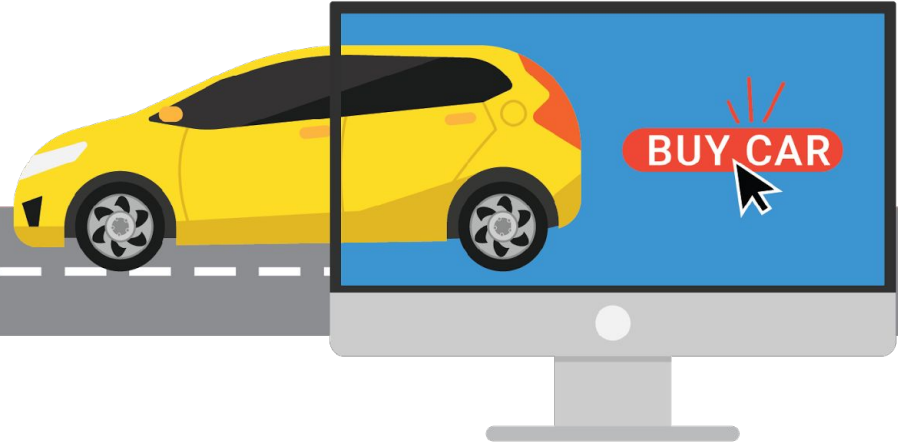
# ↓ 4 to 2

50% reduction in  
dealership visits  
in 3 years

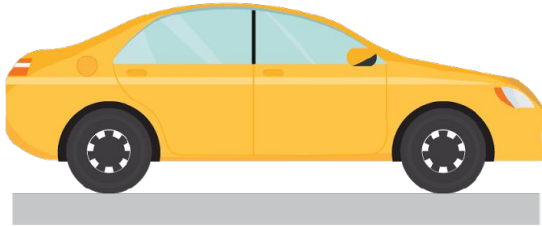


# 39%

car buyers are open to  
considering booking/  
purchasing the car online



25% in 2016



# 43%

car buyers already consider customization



# 79%

car buyers rate ability to customize as very important factor in considering the brand

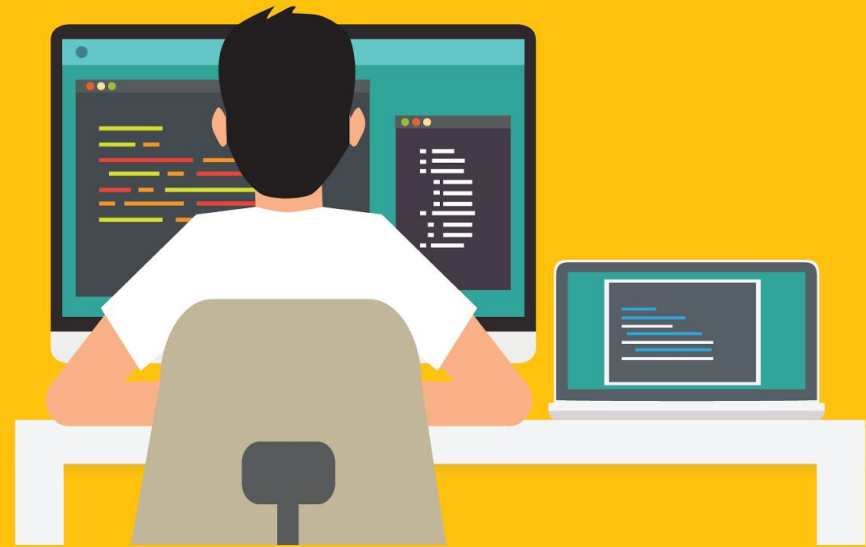


# Buyers are interested to learn more about more advanced and **innovative product features**

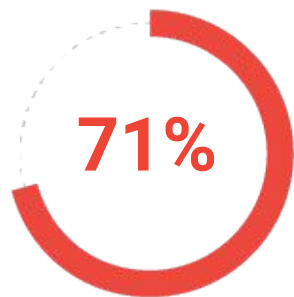


38%

Buyers search for  
semi-autonomous/ driver  
assistance features



# First Time Buyers are **more Undecided** than Repeat Buyers



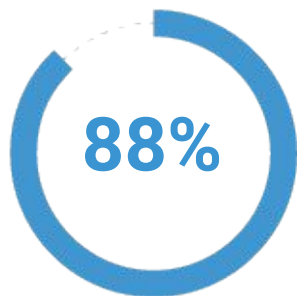
First time  
Buyers



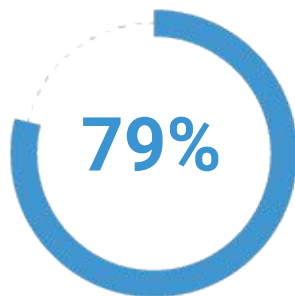
Repeat  
Buyers



# First Time Buyers **research more** than Repeat Buyers



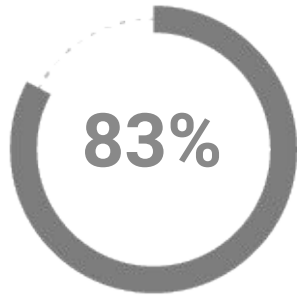
First time  
Buyers



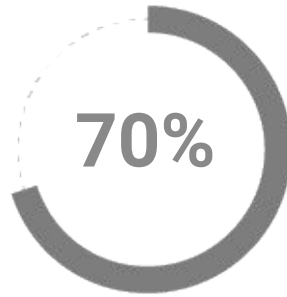
Repeat  
Buyers



First Time Buyers use **more online video** than Repeat Buyers during their purchase journey



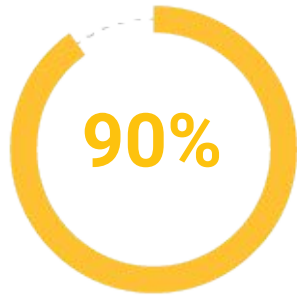
First time  
Buyers



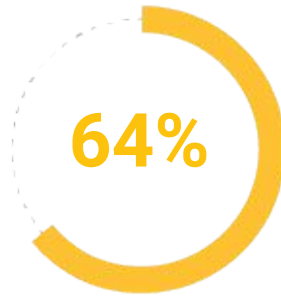
Repeat  
Buyers



# First Time Buyers' purchase decision is **more influenced by family** than Repeat Buyers



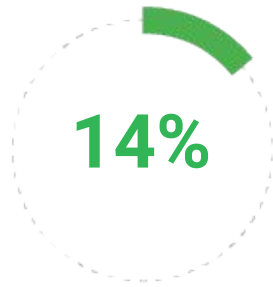
First time  
Buyers



Repeat  
Buyers



# First Time Buyers' purchase decision is **more influenced by children** than Repeat Buyers



First time  
Buyers



Repeat  
Buyers



# Thank you!

