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Automotive Survey: What Digital Drivers Want

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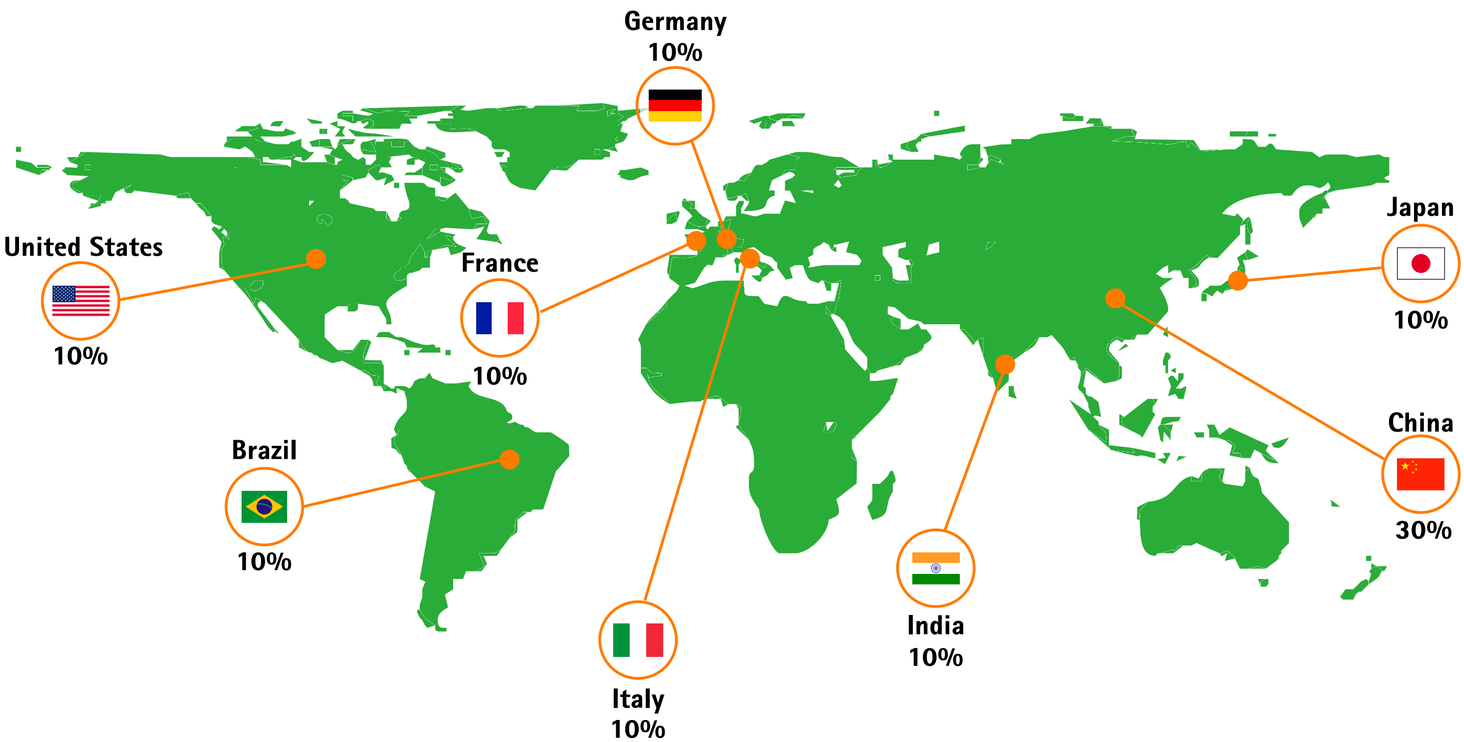
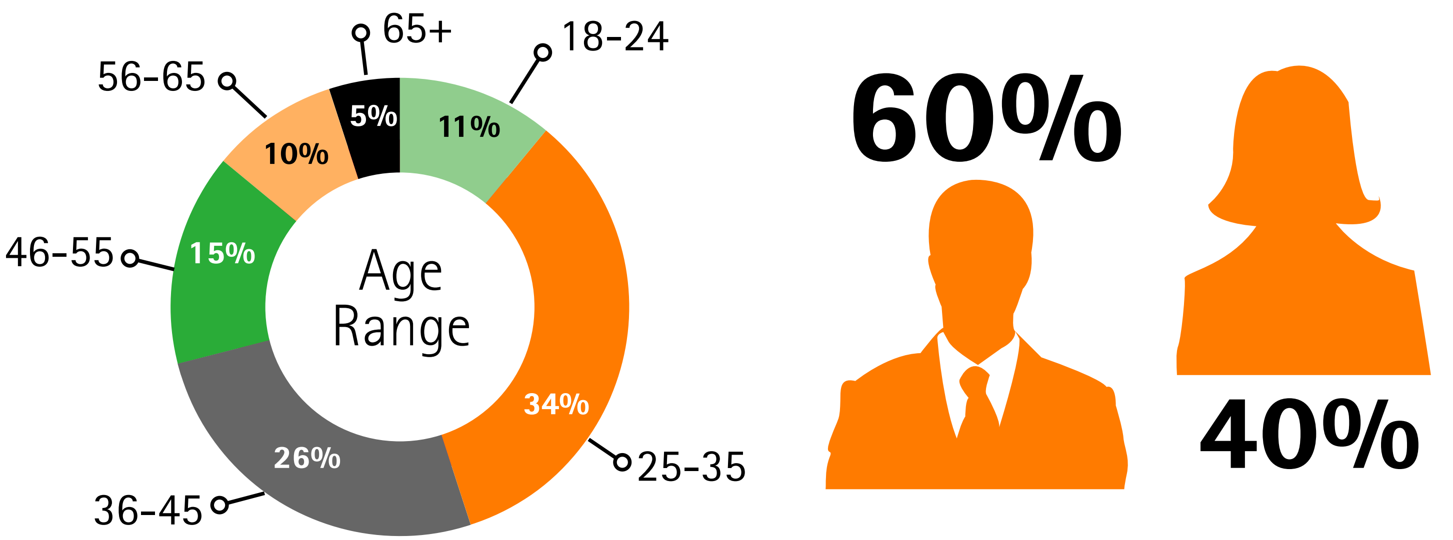
Accenture conducted a global survey of 10,000 consumers, in December 2014, across eight countries to determine their digital experiences and expectations before, during and after buying a car.

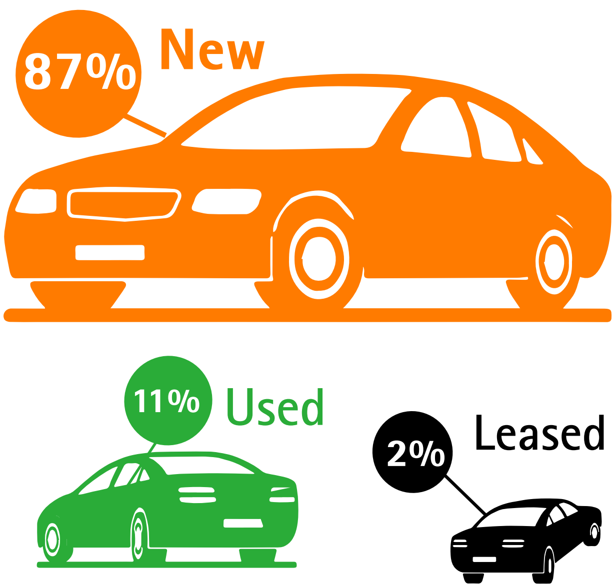




Did you purchase the car?

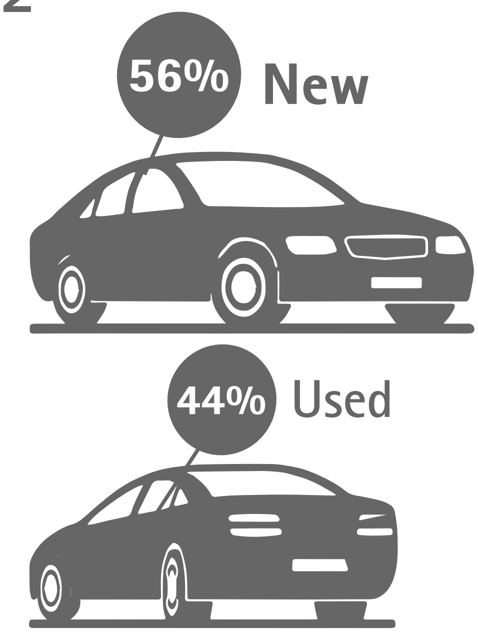
Overwhelmingly in 2014, most consumers purchased a new car vs used, surpassing new purchases from the 2012 study.

2014



Not purchased/leased was added in 2014

2012

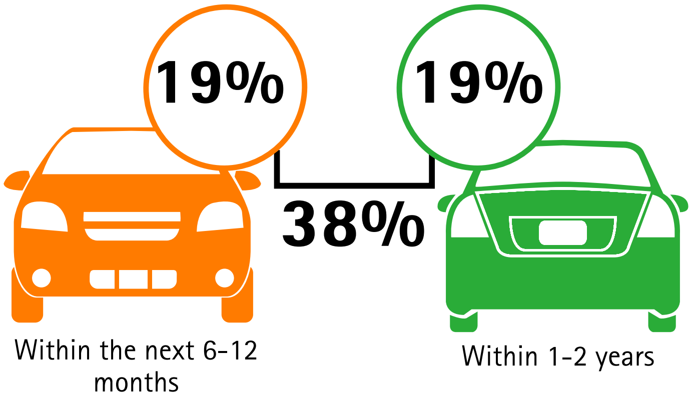


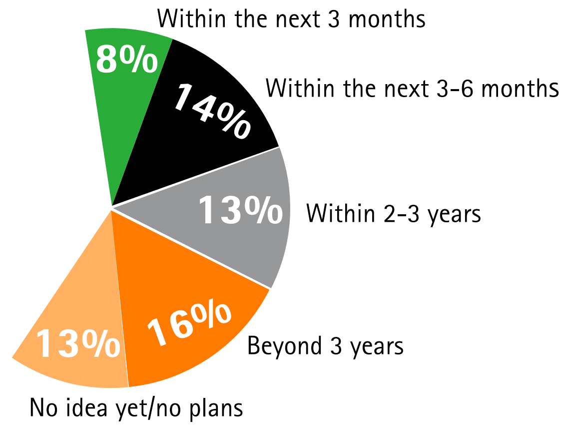
On average how many kilometers/miles do you travel in your car per year?

- 1% 50,001-70,000 miles / (80,001-112,000 km)
- 1% 40,001-50,000 miles / (64,001-80,000 km)
- 3% 30,001-40,000 miles / (48,001-64,000 km)
- 7% 20,001-30,000 miles / (32,001-48,000 km)
- 9% 15,001-20,000 miles / (24,001-32,000 km)
- 11% 12,001-15,000 miles / (19,201-24,000 km)
- 11% 10,001-12,000 miles / (16,001-19,200 km)
- 10% 9,001-10,000 miles / (14,001-16,000 km)
- 11% 7,001-9,000 miles / (11,201-14,400 km)
- 14% 5,001-7,000 miles / (8,001-11,200 km)
- 13% 3,001-5,000 miles / (4,801-8,000 km)
- 9% Up to 3,000 miles / 4,800 km

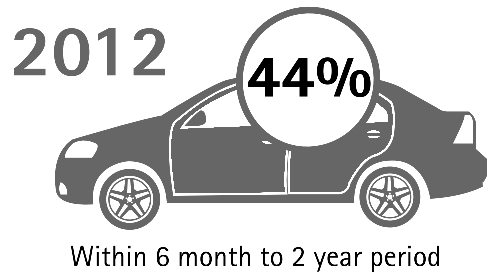
When do you expect to replace the car that you drive most often?

A large portion of the sample plan to trade in the new car within 6 months to 2 years.





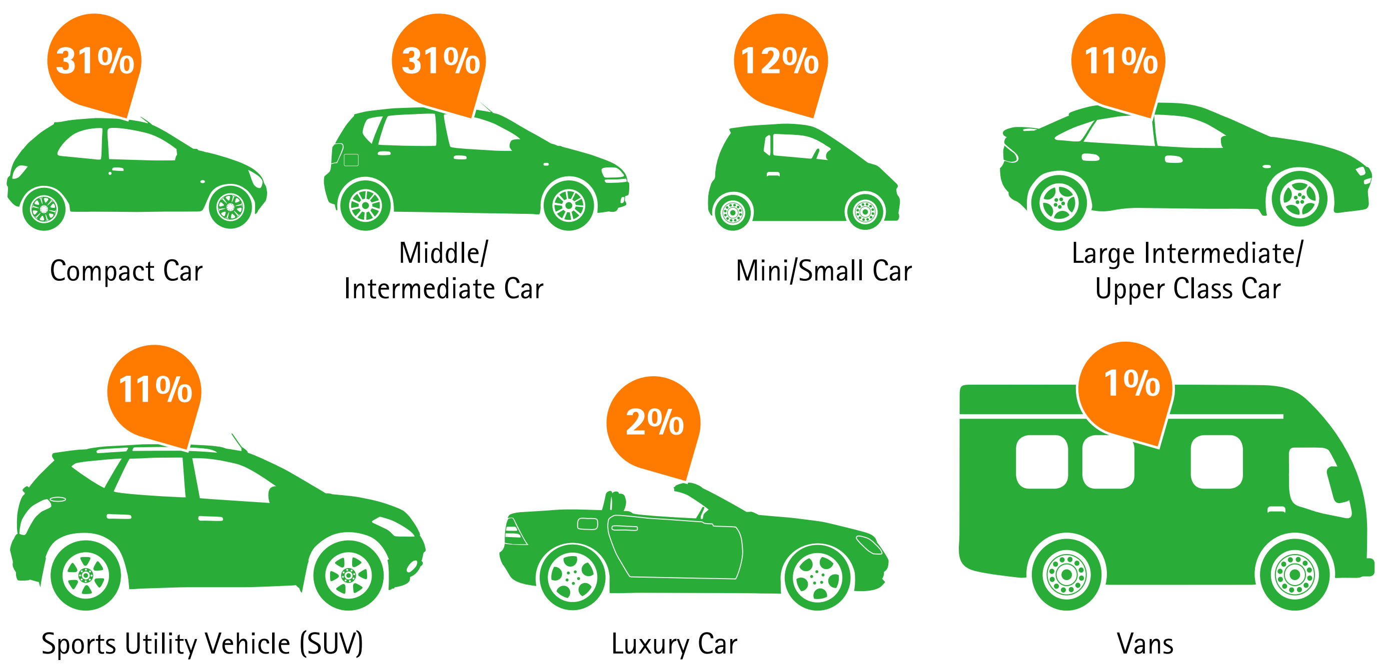
In 2012, 44% of consumers planned to buy within a 6 month to 2 year period. Again, the 2012 sample included those with cars over 3 years old, so this would have some effect as their cars would be more likely to need replacing.



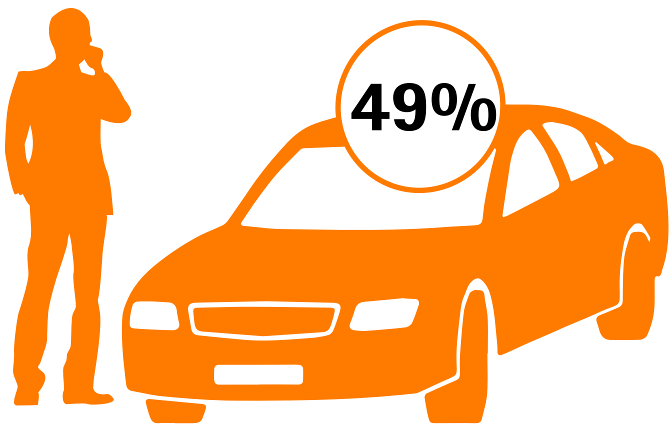
Which model/size of car do you drive most often?

Consumers look to smaller vehicles on a whole for transport needs.

Particularly in emerging economies (India and Brazil), smaller, compact cars are preferred.

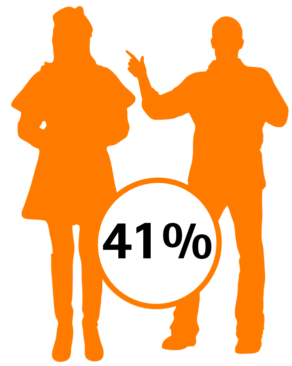


What factors are extremely influential on your decision when buying a car?



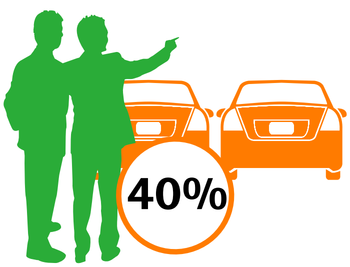
The need to replace a car was unsurprisingly the most influencing factor in 2014.

2014

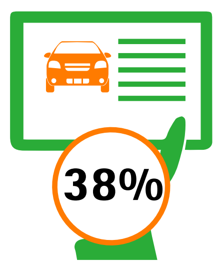


2012

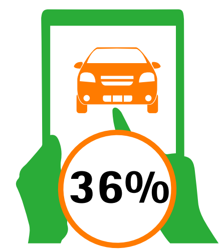
Family and friends in 2014 were the second most influential factor in 2014, falling to second place in comparison to the 2012 study here it was the top selected at 58%.



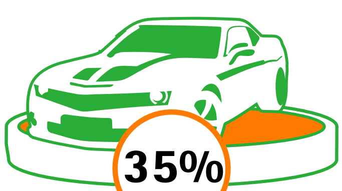
Salesman/visiting the dealership in person



Automotive sites/reading online publications of car magazines

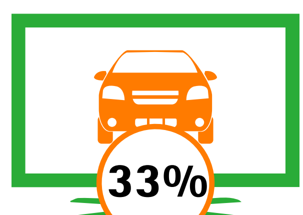


Manufacturers' websites

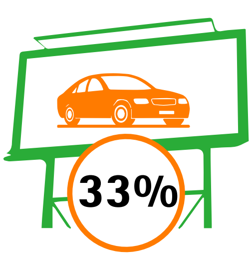


Motor shows

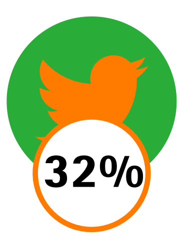
Offline information



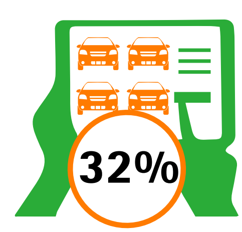
TV reviews



Manufacturer advertisements



Social media such as Facebook and Twitter/customer feedback

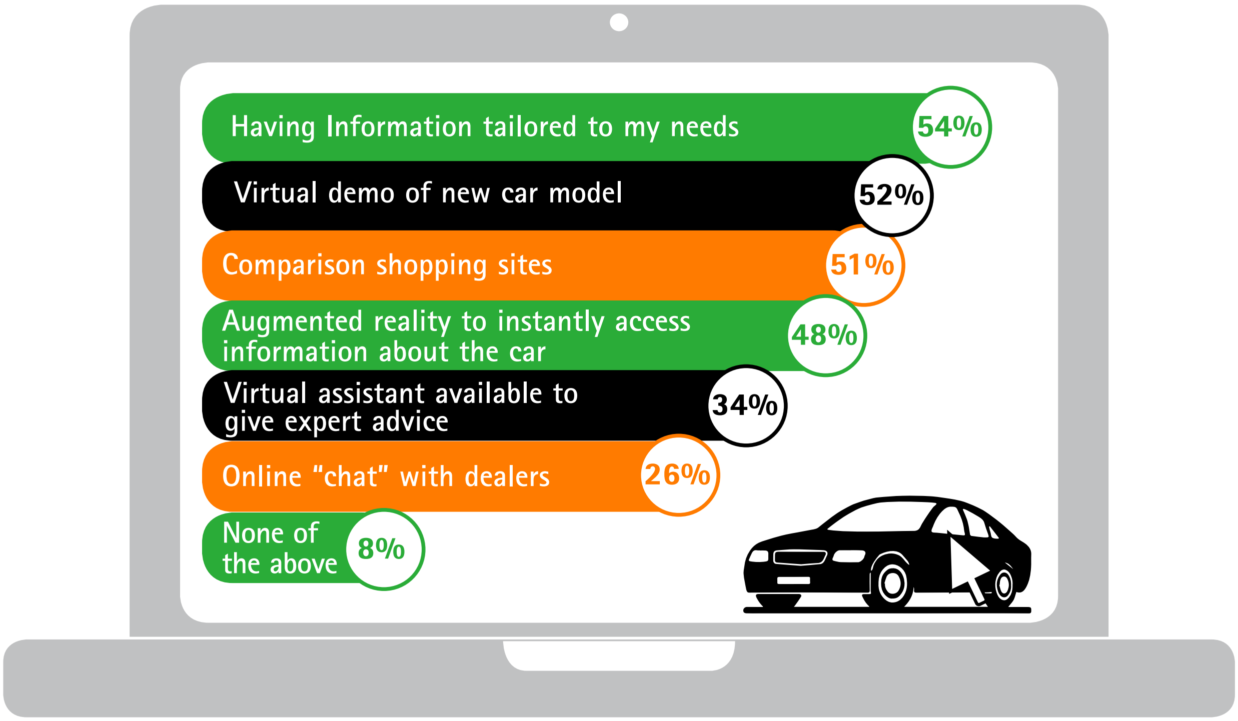


Dealer websites

Which of the following would help make the process of researching for a new car via online channels easier?

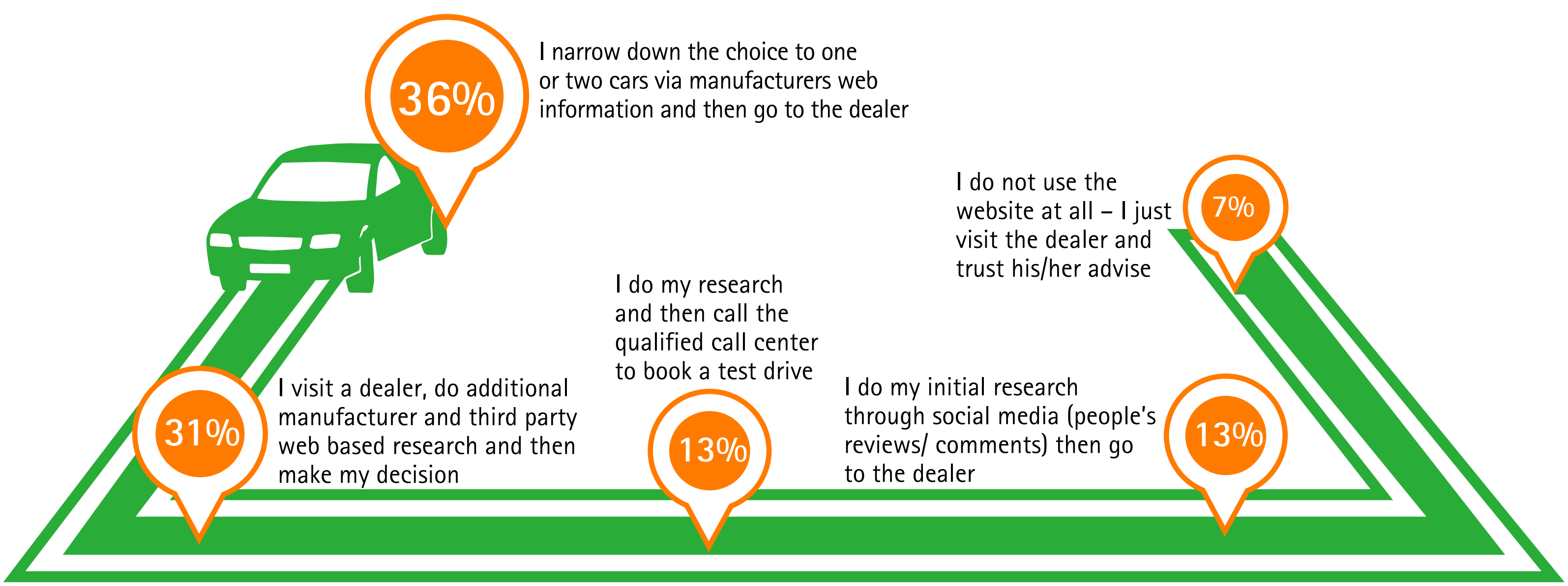
Consumers seek personalized information on cars, virtual car demos and look to online comparison sites when researching a new car online.

They are less interested in interacting with sales or dealers online during the research process.



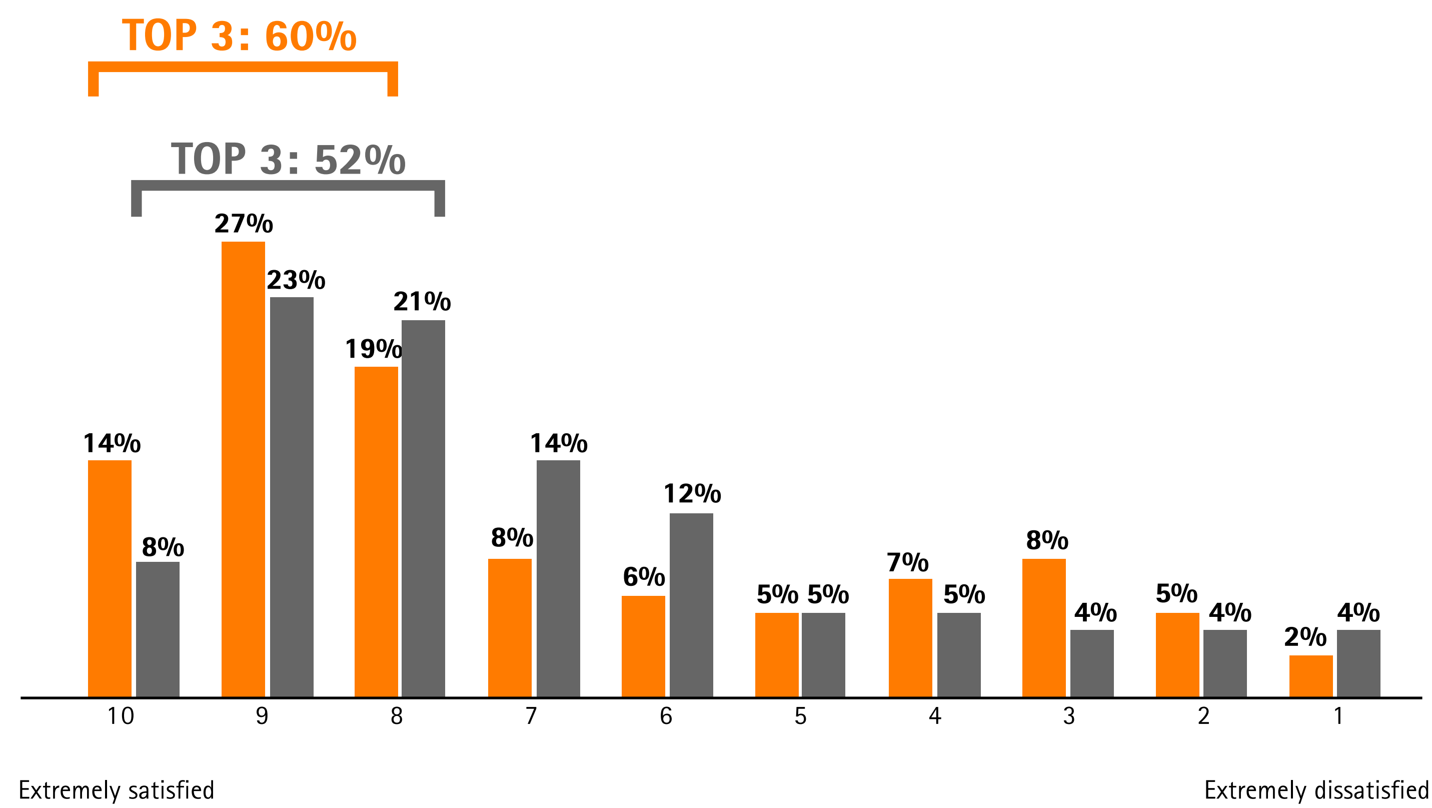
When searching for a new car to purchase which of the following most closely describes the process you use?

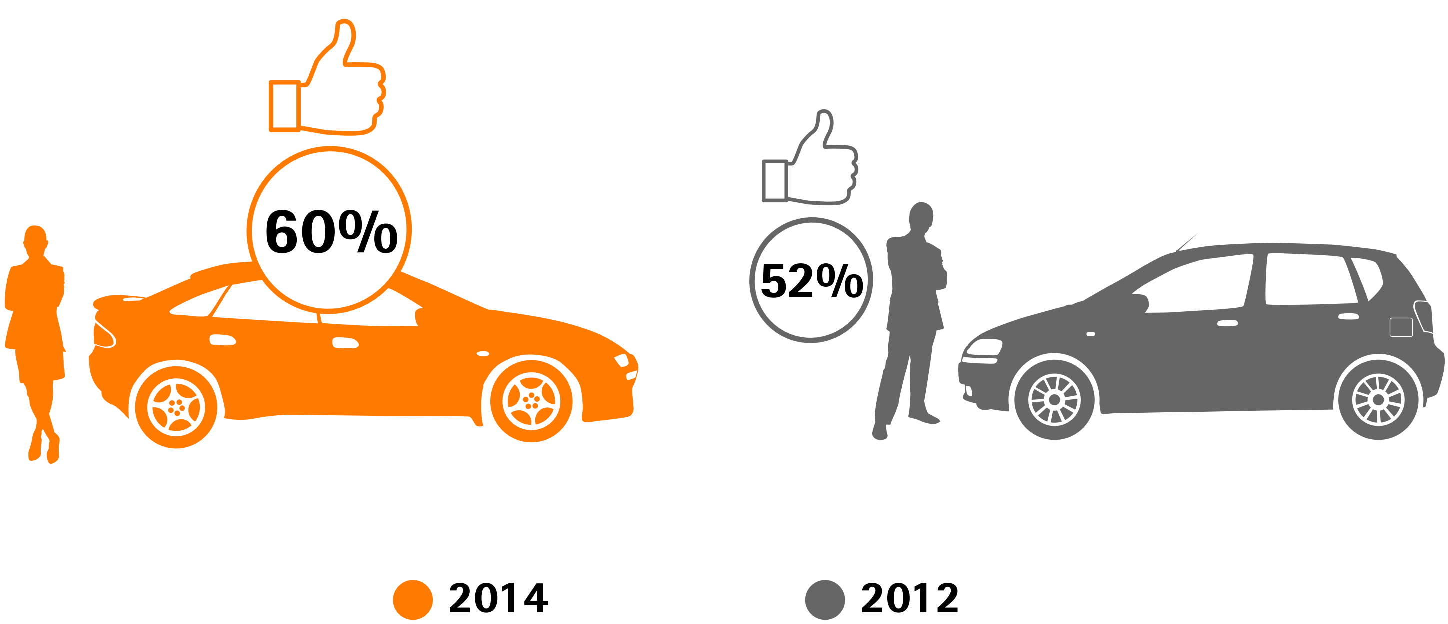
Online content about cars is an essential part of the overall path to purchase.
Consumers are more likely to start their search online and then visit a dealer.



Using a scale of 10 (extremely satisfied) to 1 (extremely dissatisfied), how would you rate your overall purchasing experience with the car that you most recently purchased?

Consumers are marginally more satisfied with their car purchase in 2014 than 2012, as more respondents are vocal about being "extremely satisfied" which has nearly doubled compared to 2012.





Which kind of customized services would influence your choice of buying/leasing a new car?

Around two-thirds of consumers state free oil changes/maintenance would influence their decision to purchase.

Club memberships and music downloads are of less interest to consumers – they are focused on benefits that give them direct financial savings rather than "extras."

68%

Free oil changes/ maintenance options

54%

Access to manufacturer's partner membership services without paying the annual fee

40%

A test drive tailored to the car chosen on the manufacturer's website

32%

Car membership club with special benefits. The level of membership will depend upon the value of the car bought

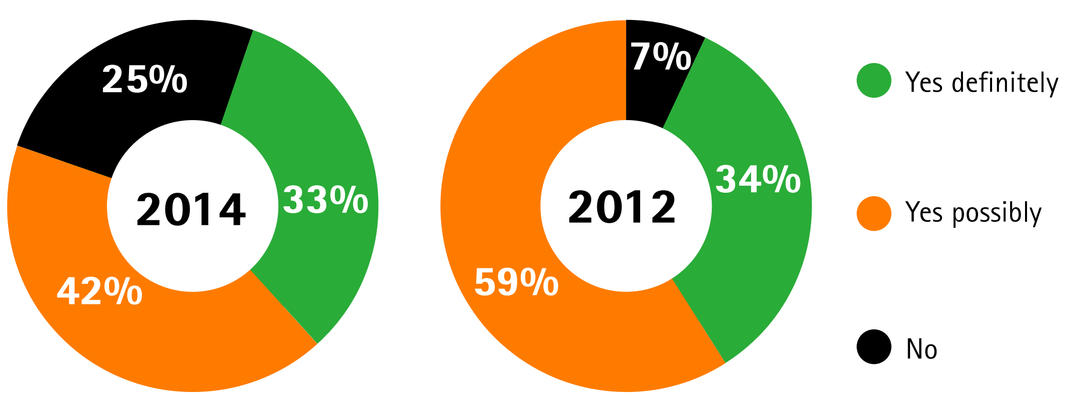
20%

Free music/ entertainment downloads with car purchase

Given the opportunity, would you go through the entire purchase of a car directly online, including financing, price negotiation, the back office paperwork, and delivery to your house?

Consumers appear to be slightly less confident about making an entire purchase of a car online.

Perhaps as some consumers have now had more online purchasing experience they can now foresee the potential problems/weaknesses.



Which special offers or valued customer services would you like to receive after you have completed the purchase of your new car?

Consumers on a whole are interested in value-added services post purchase, especially on discounted offers.

The focus is on direct/immediate savings that are tangible.

65%

Discounts on car insurance

62%

Discounts on fuel

51%

Manufacturer and third partner specials offers throughout the year

42%

Remote check of my car and a software update

41%

Mobile phone reminders for annual service checks

40%

Personal pick up service from my house to dealership for servicing

25%

Discount travel offers

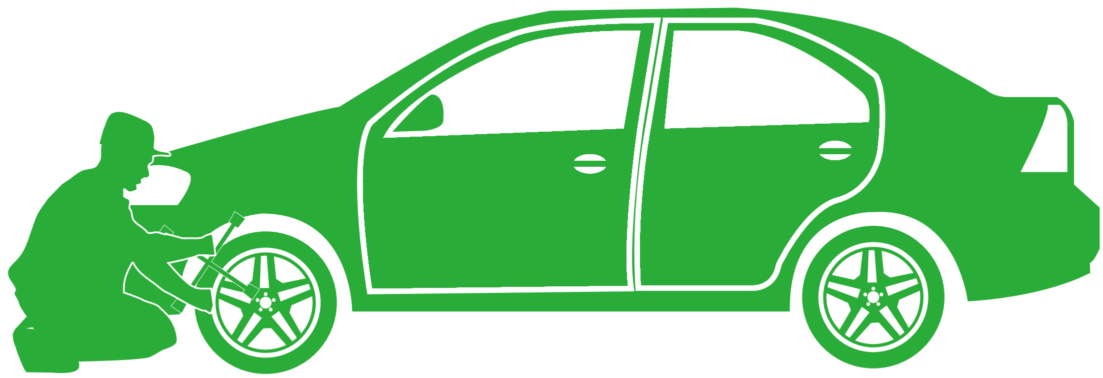
19%

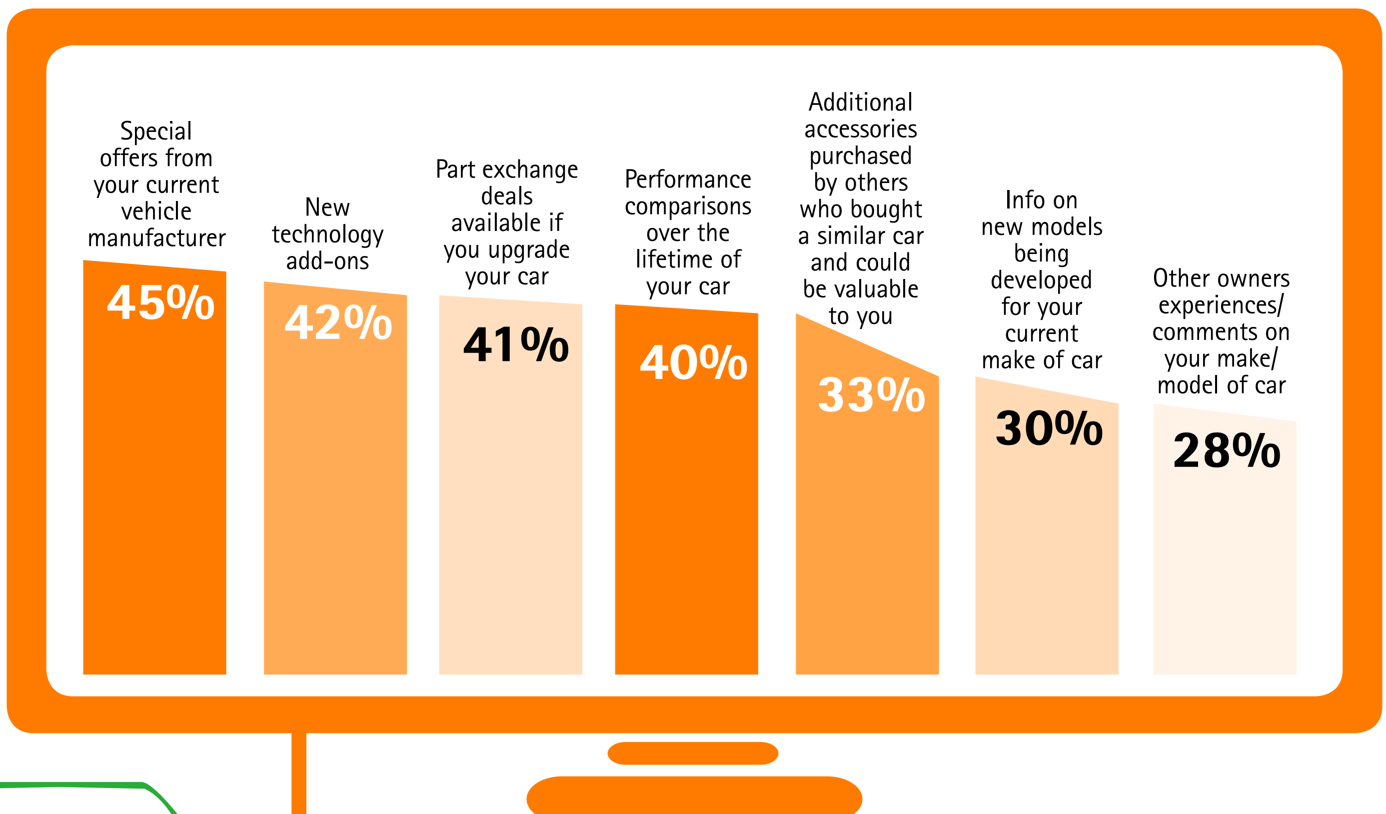
Guide of local points of interest while driving

Which of the following additional information would you like to hear about directly from your dealer or manufacturer?

The vast majority of consumers are interested in special maintenance offers from dealers, but there's a steep drop off after that to interest in other services from dealers.

69%
Special maintenance service offers





Top 3 in 2012:

In 2012, consumers appeared to be more interested in general in any information/offers from dealers.

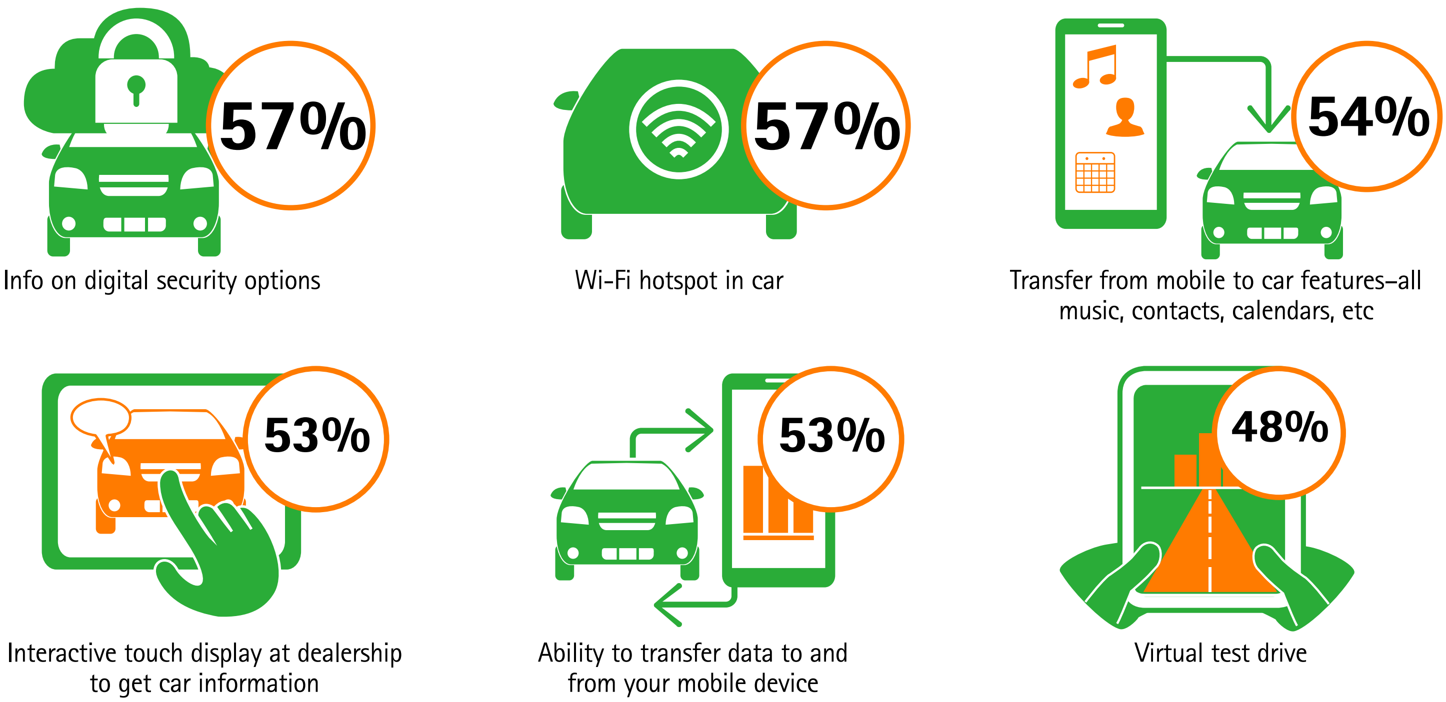
89% Special offers for current vehicle brand owners

80% Part exchange upgrades

78% Additional extras for your car after purchase

How appealing or unappealing are the following digital customer experiences at your local dealership/showroom?

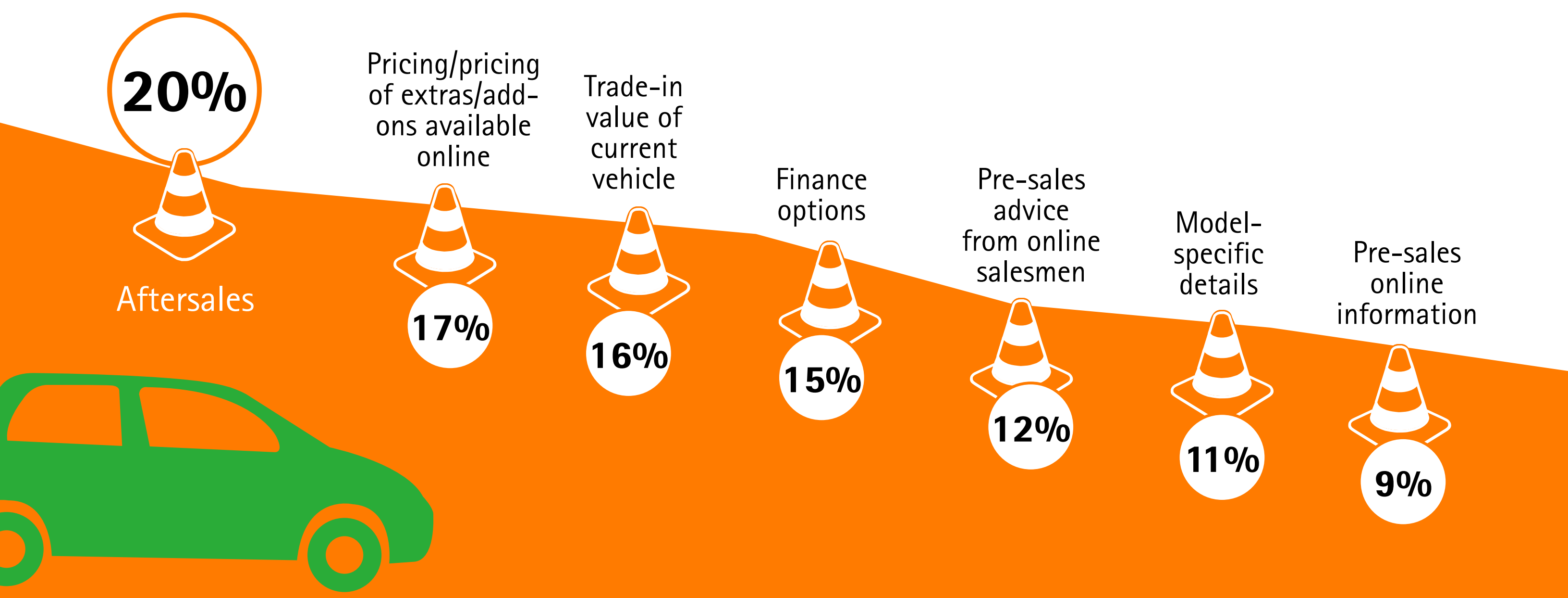
Overall, consumers appreciate all the proposed digital experiences at the local dealership with over half of consumers on most options finding the potential services appealing.



Summary of appealing digital experiences

From car buyer to car owner and user, which stage in your journey provides the weakest digital experience?

Though aftersales is weaker, most of areas need streamlining to ensure that consumers can get the information/sales experience that they require and feel that they can currently get from the "personal contact."



How would you see your digital/online experience of buying a car change in next three to five years?

Interestingly, only 13% of consumers believe the car industry will be disrupted by digital means. Personal interaction currently appears to still be an important part of the purchase process.

37% The digital experience will help the process but the requirement for personal interaction will remain for advice, personal service, and being able to view the car

22% Customers will be able to buy, finance and have a car delivered completely via an online interaction

20% Customers will be able to purchase nearly the entire car online but the final paperwork will still need to be completed in person

13% Car purchasing is not an industry that can be disrupted by digital means

8% Car purchases will be viable with the click on your phone/mobile

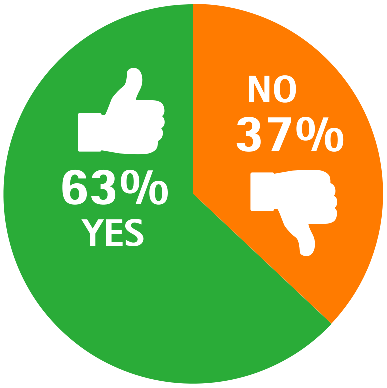
If you purchased a car directly online, which of the following would be the main parts of the overall traditional buying process you would miss?

The main experiences buyers would miss are interactive, physical connections with the car itself which aligns to the 2012 data.

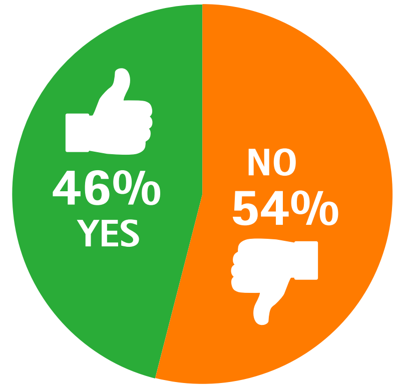
Test driving and reviewing the models – physically viewing the car – would be most missed by consumers.

	2014	2012
The test drive	56%	70%
Reviewing the models in person	47%	71%
Negotiating with the salesperson on price	42%	65%
The feeling of excitement in the showroom	32%	65%
Negotiating with the sales person on trade in	28%	69%
Understanding the full options list	26%	54%
Contact/Additional insight from the dealer	26%	68%

Would you be interested in online auctions to buy a new car?

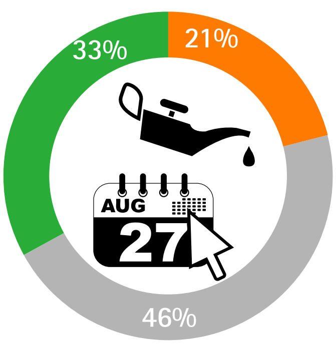


Would you be interested in online auctions to buy a used car?

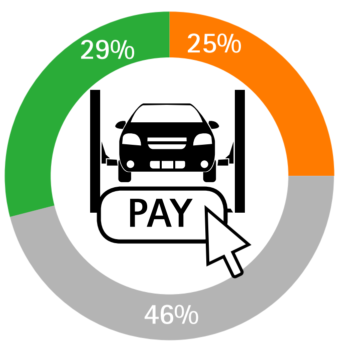


Although there are some statistically significant differences in a new or used car purchase, on a whole, consumers are amenable to purchasing in an auction.

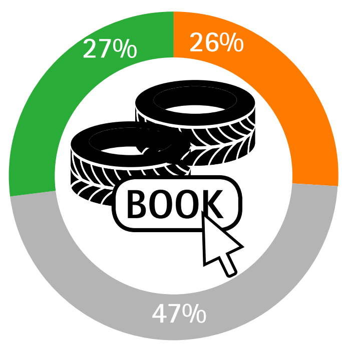
Which of the following have you already done online and which would you consider?



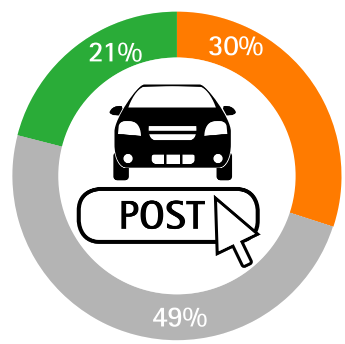
Booked a service for your car



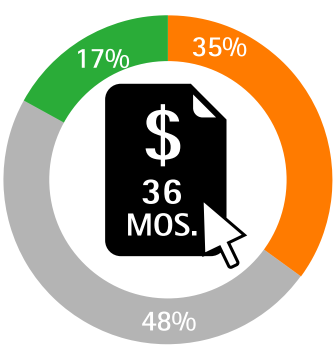
Paid for your car service



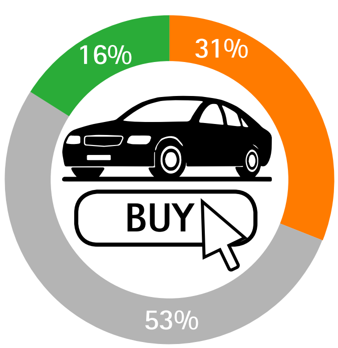
Bought tires and organized fitting



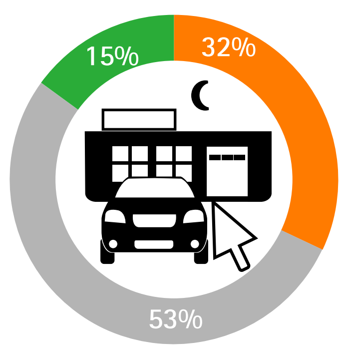
Sold an old car



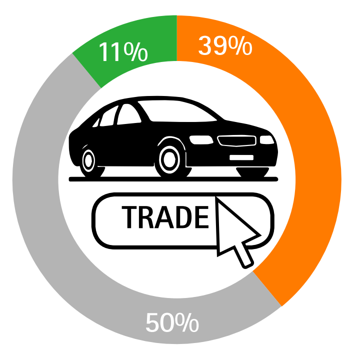
Organized financing for a car



Bought a new car



Organized a pickup out of hours after a service



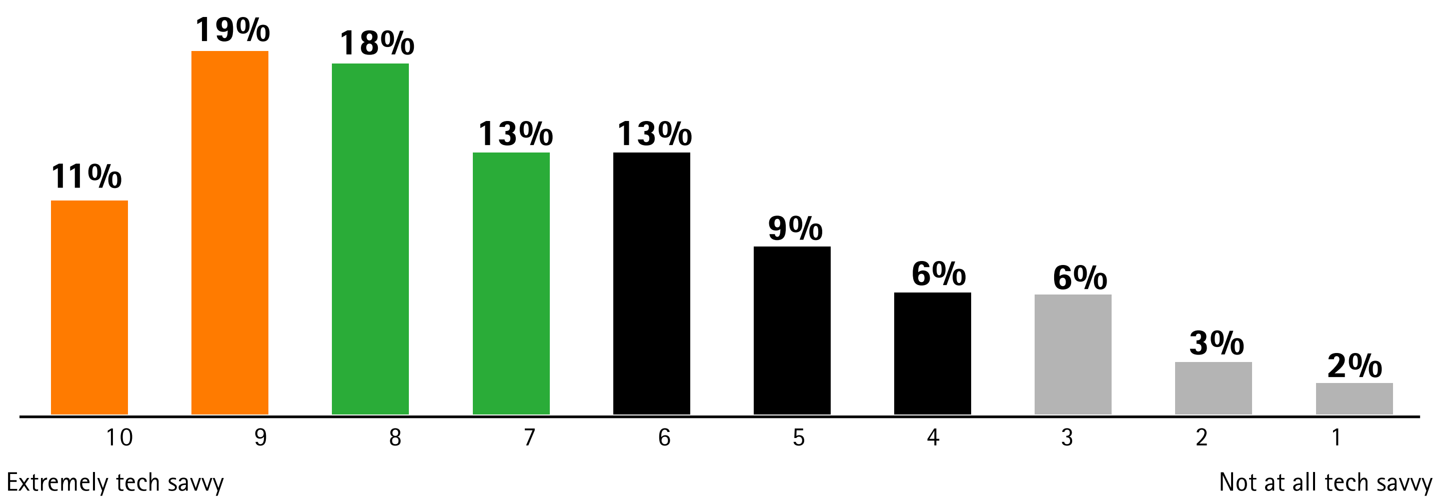
Traded in an old car

Done Would consider Neither have done nor would consider

Using a scale of 10 (extremely tech-savvy) to 1 (not at all tech-savvy), how would you define yourself in respect of technology usage?

Consumers believe they are "extremely" tech savvy with 30% being considered as "Natives."

Only 10% believe they are at the low end of tech savviness, illustrating a good opportunity in the future digital car purchases.



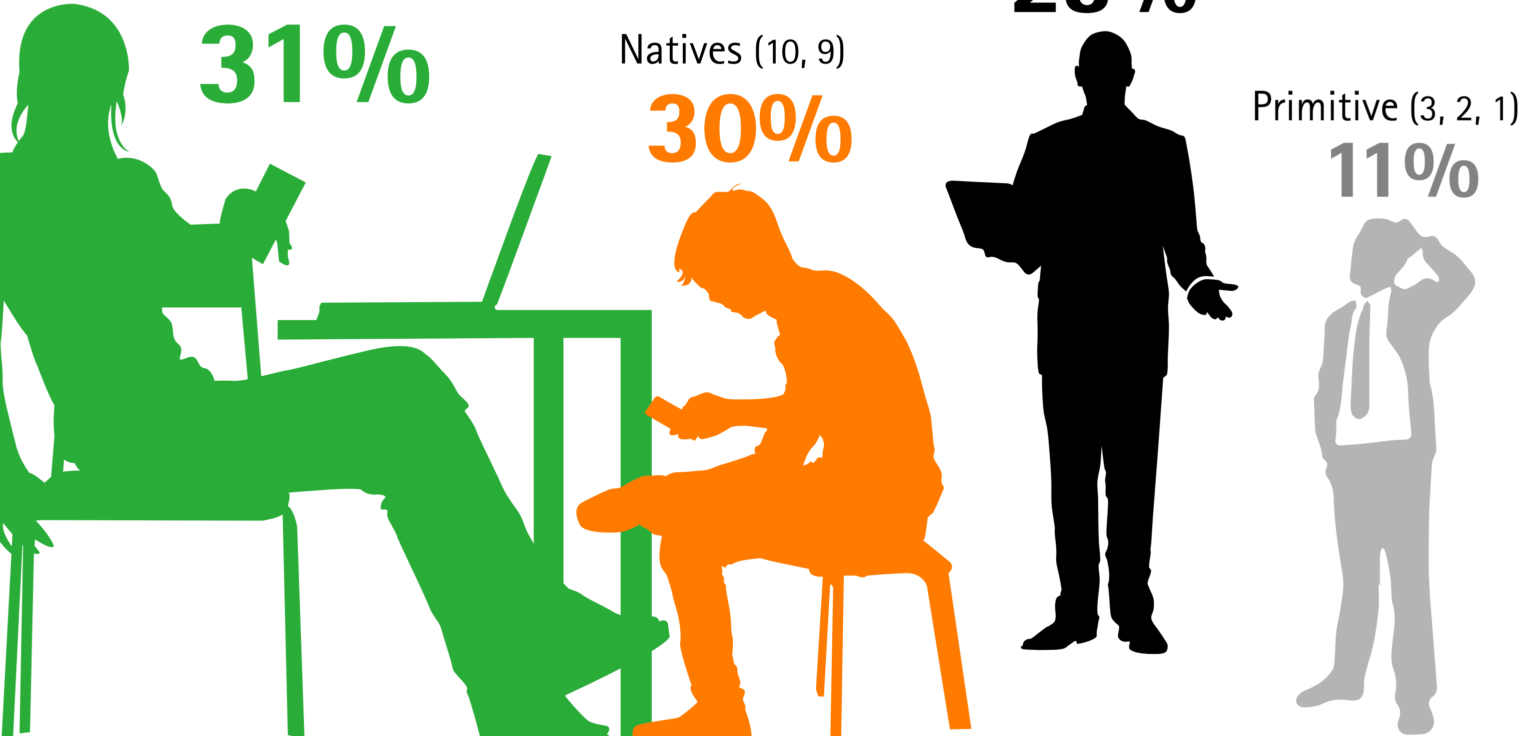
Summary

Advanced (8, 7)
31%

Natives (10, 9)
30%

Beginners (6, 5, 4)
28%

Primitive (3, 2, 1)
11%



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