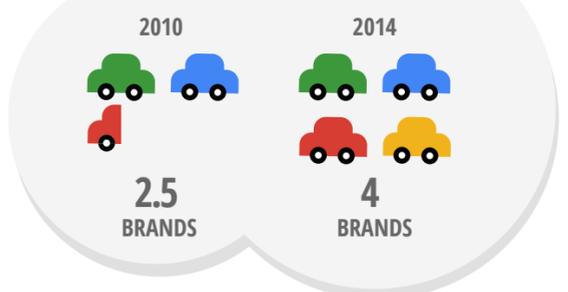


A CAR SHOPPER'S JOURNEY



28
DAYS
median



MORE BRANDS
ARE BEING CONSIDERED

LESS TIME
TO INFLUENCE

↓18% Time researching purchase compared to 2010

SHOPPERS ARE RESEARCHING

Research time allocation

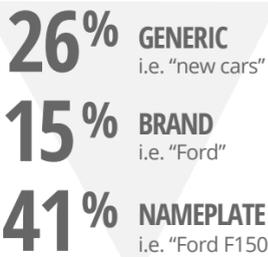


	Source used	Influence
INTERNET	66%	37%
DEALER	62%	32%
BROCHURE	28%	6%
FRIENDS & FAMILY	27%	11%
SAW VEHICLE	14%	4%
NEWSPAPER	14%	5%
TV	13%	5%

INTERNET IS THE MOST USED & MOST INFLUENTIAL

SHOPPERS ARE ONLINE

Shoppers are entering the funnel at different points. Nature of first search.



Actions taken as a result of search

VISITED A DEALER	58%
VISITED OEM WEBSITE	50%
TOOK A TEST DRIVE	43%
VISITED DEALER WEBSITE	42%
ENHANCED OPINION	40%

Main online research activities

VIEWED PHOTOS	67%
COMPARED SPECS	66%
READ REVIEWS	63%

MAKE YOUR WEBSITE A ONE-STOP SHOP

SHOPPERS ARE BUYERS

They are going to more dealers



40% WILL USE MOBILE AT DEALER

3 IN 10 buyers will leave and never come back to the dealership or the brand for service

GIVE BUYERS A COMPELLING REASON TO COME BACK



have already decided on their brand preference before visiting a dealer

53% UNDECIDED

THE AUTOMOTIVE ZMOT IS MORE IMPORTANT THAN EVER

VIDEO



29% of shoppers use video websites as an information source

As a result of watching an online video they

VISITED A DEALER	61%
CHECKED DEALER INVENTORY	30%
TALKED TO FAMILY & FRIENDS	23%
SHARED A VIDEO	23%

MOBILE



26% of shoppers used their tablet or smartphone throughout the research process

The top information they seek

VEHICLE PRICING	66%
MODEL INFORMATION	54%
PHOTO GALLERIES	53%
REVIEWS/RATINGS	52%
COMPARE VEHICLES	47%

SOURCE Google Think Auto Study, Conducted by Ipsos, New Car Buyers, 2,014 respondents, June/July 2013.