



# Constant Consideration: Brand Choice on the Path to Vehicle Purchase

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## THE RUNDOWN

Digital continues to change the purchase path for auto shoppers. For today's consumers, vehicle attention may rise and fall, but influential brand moments are constant, stretching across a cycle that encompasses pre-market, in-market, and post-market phases. With 63 percent of new vehicle purchasers beginning their search with a specific brand in mind, but only 20 percent purchasing the vehicle they first researched online, it's clear that brand consideration can be won or lost at any point throughout this loop. By harnessing the unique insights and immersive, personal experiences afforded by digital brand-building, auto marketers can adapt for greater sales and long-term loyalty.

We live in the age of engagement. Digital has amplified the opportunity for brands to connect with consumers at the moments that matter, across an array of platforms, screens, and devices. At the same time, however, there is a growing skepticism – even among ad agencies – as people begin to question whether consumers really care about brands at all.

According to Weiden+Kennedy Amsterdam, 72 percent of Pepsi fans also drink Coca-Cola. Their conclusion: 'Your' consumers 'are just somebody else's consumers who occasionally buy you.' Is this true? And if it is, what is the real value of a fan, a Like, a +1, or a tweet? In fact, how do we define engagement at all?

Happily, our research suggests that there's no need for doom and gloom. Yes, consumer behavior has changed with the digital revolution, but brands should see this as an opportunity, not a cause for despair.

For the auto industry, it means embracing a new model in which marketers no longer view potential customers merely as 'shoppers.' Rather, they are owners who bring with them strong brand notions based on their experiences before, during, and after their last vehicle purchase.

They are on a continuous journey starting long before they are in-market and continuing long after they buy. Each moment leads fluidly into the next, from the instant the car is driven off the lot, when pictures and reviews are posted online, to servicing milestones and the everyday experience of the vehicle, which shapes consideration the next time the owner is ready to shop for a new vehicle.

*"Potential auto customers aren't 'shoppers,' they are owners that bring with them strong brand notions based on their experiences before, during, and after their last vehicle purchase."*

We call this continuous feedback loop of vehicle interaction, research, and experience 'Constant Consideration.' It's a cycle in which brand interest can be won or lost at any point, which is why 100 auto executives surveyed by the IBM Institute for Business Value cited customer management as the part of the automotive value chain that will change most over the next decade. It sounds daunting – a never-ending story of auto marketing – and yet the same force creating the challenge of constant information also provides the solution. By harnessing the unique insights and immersive, personal experiences afforded by digital brand-building, auto marketers can adapt for greater sales and long-term loyalty.

## PRE-MARKET **MOMENTS**

We use the term pre-market to refer to the phase at which consumers aren't yet actively researching a purchase but are nevertheless exposed to brand marketing.

To dig deeper about how brand notions are formed as a result of pre-market influences, with the help of Polk and Compete, we tracked the online research activity of over 10,000 vehicle buyers leading up to purchase. What we found challenged the conventional wisdom that the search path for a given category (say, luxury) begins with generic search terms before narrowing to a brand of choice. Instead, 63 percent of new vehicle purchasers begin their search with a specific brand in mind, having been influenced in a meaningful way during the pre-market stage.

This can be a lengthy process, sometimes lasting years, and as a result is tough to measure. But a strong digital strategy can undoubtedly help. Not too long ago, brands were limited to broadcasting their content through a limited number of sources to many viewers at once. Today, digital storytelling allows brands to 'microcast,' or connect with many smaller, concentrated audiences who represent truly passionate viewers. At the moment where consumers are least likely to care about your vehicle, microcasting enables brands to align themselves with something consumers do care about. And in a connected world, brands can combine their storytelling with social interaction.

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## CASE STUDY

*The digital space affords a near-infinite array of passion points. For the all-new 2013 Dodge Dart, the focus was humor and reaching out to millennials who like their information served with a side of comedy and skepticism. That made The Onion a perfect partner. Dodge sponsored The Onion's YouTube channel (with over 200 million views to date) and collaborated on a three-minute video in which advertising for the Dart was cleverly smuggled into a sketch poking fun at... TV advertising. The partnership allowed the Dart to connect with consumers' true passions while affording them the opportunity to share their stories, thus driving engagement and brand favorability.*

*(For more examples of automotive brand-building, see Google's Creative Sandbox)*

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## IN-MARKET MOMENTS

On entering the market, your potential consumer becomes a shopper, actively researching and planning a purchase. This competition for awareness and favorable opinion gets even more intense. Remember those 63 percent of shoppers who formed an initial consideration set before they entered the market? Well, once in-market, only 20 percent of shoppers actually buy the vehicle they first researched. Over the course of

in-market research, search data suggests that 73 percent of in-market activity involves cross-shopping.

Although the brand objective may now have changed, branding itself is more important than ever, especially across multiple screens. Younger, open-minded shoppers – those who consider four or more brands in-market – are increasingly turning to multiple screens for research and discovery: Indeed, they're almost twice as likely to use mobile and tablet devices as their older, more brand-loyal counterparts.

Tablets in particular will quickly become a 'killer app' for auto shopping, combining sight, sound, and motion with the convenience of a device that sits in your lap. Our research found that 43 percent of brand-agnostic shoppers use video sharing sites across desktop and mobile devices, while once on the lot, 51 percent take pictures; 49 percent check online reviews; and 44 percent use comparison tools. Mobile and video are changing the shopping ecosystem as it's being built.

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## CASE STUDY

*When Volvo launched the S60 to take on the likes of the BMW 3-Series and Mercedes C-Class, it approached this highly competitive sector with a cross-platform approach that took maximum advantage of digital technology. On desktop, Volvo employed large ad formats like the YouTube homepage masthead, but it was on mobile that the campaign came into its own. Interactive mobile ads allowed consumers to explore a 360-degree view of the S60, swipe for more photos and videos, and locate nearby dealerships. What's more, an augmented reality test drive experience in a YouTube masthead provided something truly groundbreaking. Volvo realized that when it comes to mobile, it's important not to just replicate across screens, but to make use of each screen's unique capabilities – whether it's geolocation, interactivity, or the intuitive fun of swiping. The result was an increase in purchase intent of 88 percent, and brand favorability of 240 percent.*

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## POST-MARKET MOMENTS

As the buyer drives off the lot, what is often considered the end of the process is actually just the beginning of the next sale.

Service moments and milestones can build or erode long-term brand loyalty. Immediately after purchase, 87 percent of new owners say they're likely to buy the same

brand next time. But the reality is a bit different: Only 56 percent end up as repeat purchasers. What happens to that missing third and how can you get them back?

Begin by considering how digital can help owners endorse your brand to others while maintaining loyalty themselves – especially at the dealership. How can you use social, review, and maps channels to get consumers talking about their experiences? More to the point, are those experiences worth talking about to begin with? Owners cite service moments as brand influencers, so treat maintenance moments as branding opportunities with optimized digital service experiences. And once you delight owners, help them pass the message on to others.

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## CASE STUDY

*There are 6.8 million Camry owners in the US – the problem for Toyota was that they were virtually silent online. New shoppers, on the other hand, wouldn't consider buying a Camry until they'd read one or two reviews. Undeterred, Toyota saw an opportunity to utilize digital and social in a way that inspired conversation and redefined the owner's role. Alongside Saatchi & Saatchi, they created an ever-evolving social network with dynamic choose-your-own-adventure questions and real-time stats based on user interaction. Dealers became an important pillar, amplifying the brand message and social outreach through their own channels. Through a final display ad campaign, these real-world stories became the research material of the next in-market shopper, continuing the virtuous cycle of Constant Consideration. The result was an 800 percent spike in real-world Camry interest, and 19 percent more sales leads than pre-campaign.*

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## CONCLUSION

The data tells us that for automotive consumers, vehicle attention may rise and fall throughout shopping and ownership, but there are brand moments to be won at each stage. As customers form opinions during three phases of the purchase path, brand-building should be a shared responsibility of the brand, in-market, and service teams. Auto marketers who use new digital tools to identify and connect with consumers at the moments that matter will win in this new era.

## KEY TAKE-AWAYS

### I) PRE-MARKET

**What you need to know:** Sixty-three percent of new vehicle purchasers begin their search with a specific brand in mind.

**What you need to do:** To create consideration, use digital tools to connect with passionate audiences and align your brand with something consumers care about.

### II) IN-MARKET

**What you need to know:** Only 20 percent of shoppers buy the vehicle they first researched online, while 73 percent of in-market search activity involves cross-shopping.

**What you need to do:** Focus on being found and being favorable. Drive consideration and purchase intent across screens to reach the most open-minded shoppers.

### III) POST-MARKET

**What you need to know:** Eighty-seven percent of new owners say they're likely to buy the same brand next time, but only 56 percent end up as repeat purchasers. Owners cite service moments as brand influencers.

**What you can do:** Amplify the attachment. Enable endorsement through social, review, and maps channels. Use newly accessible customer information to anticipate maintenance needs and to delight owners.

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