Automotive Survey:
What Digital Drivers Want
Italy Results
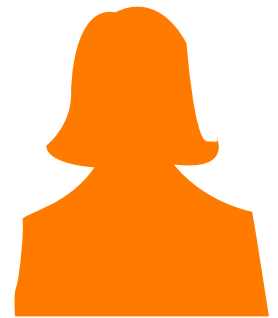
High performance. Delivered.

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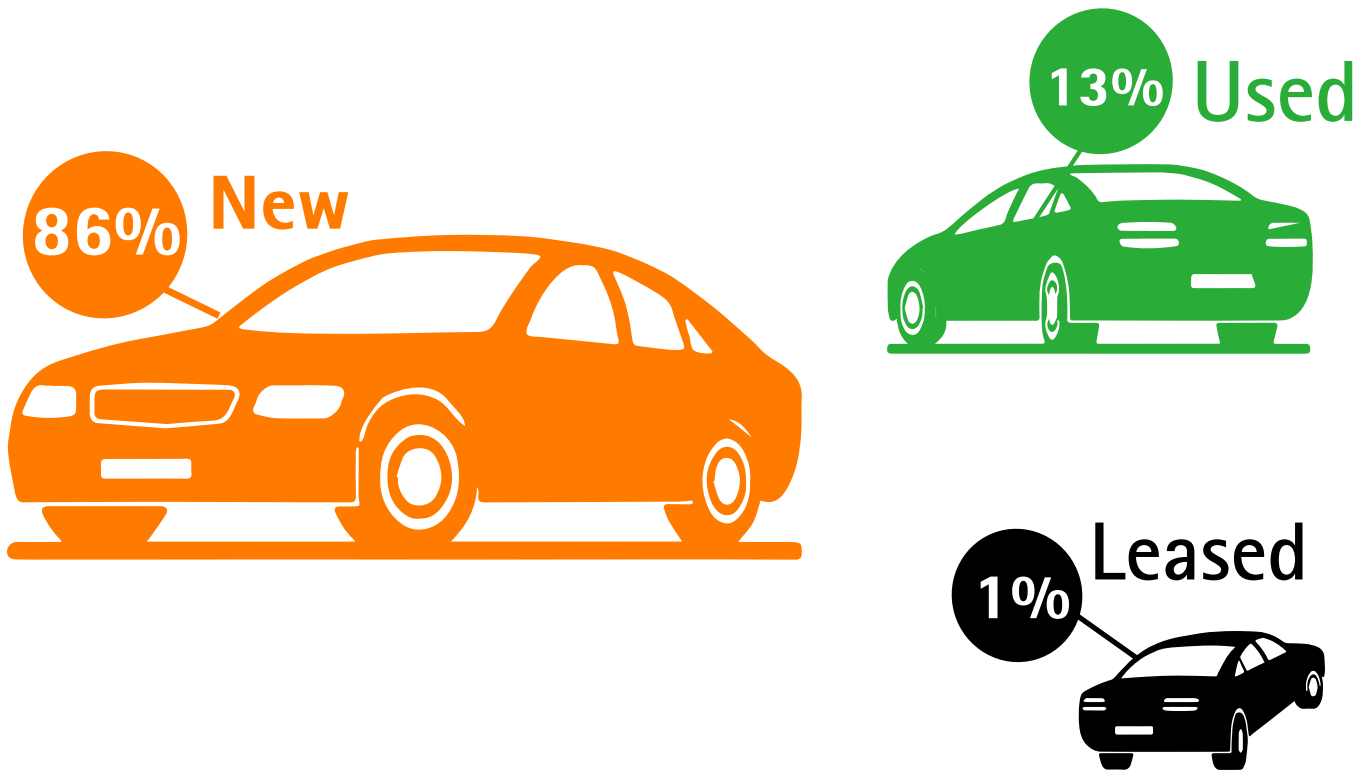
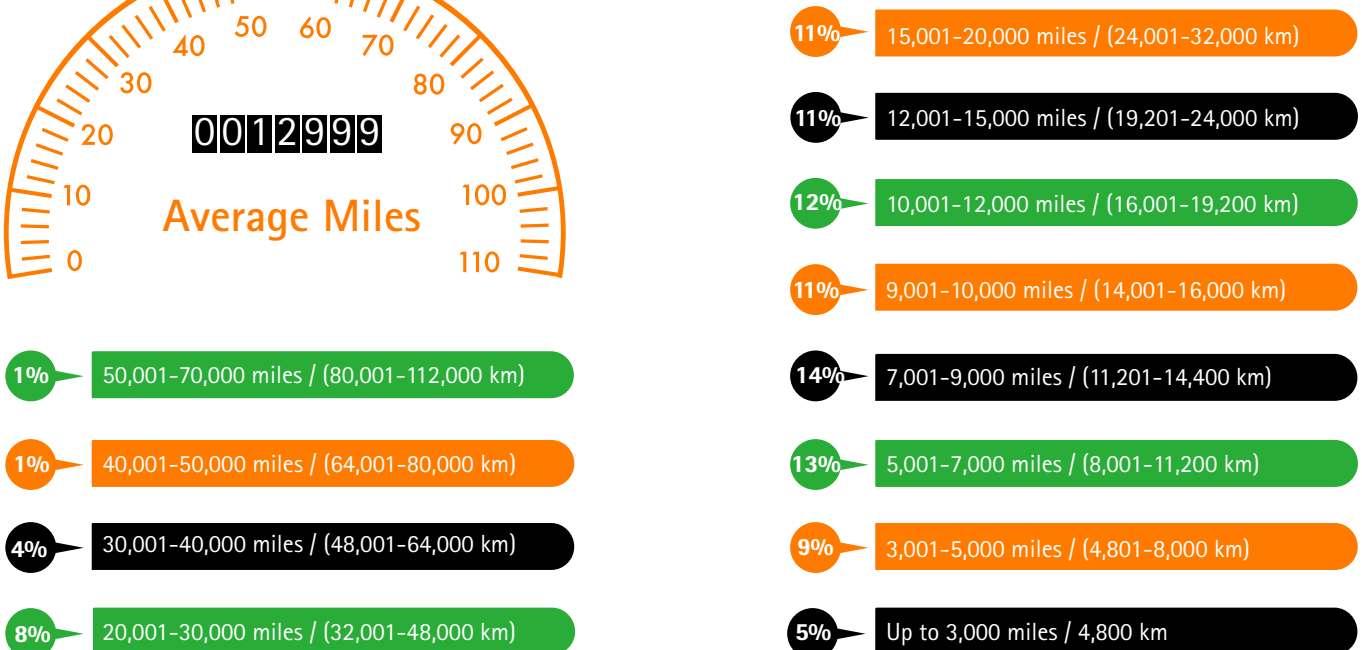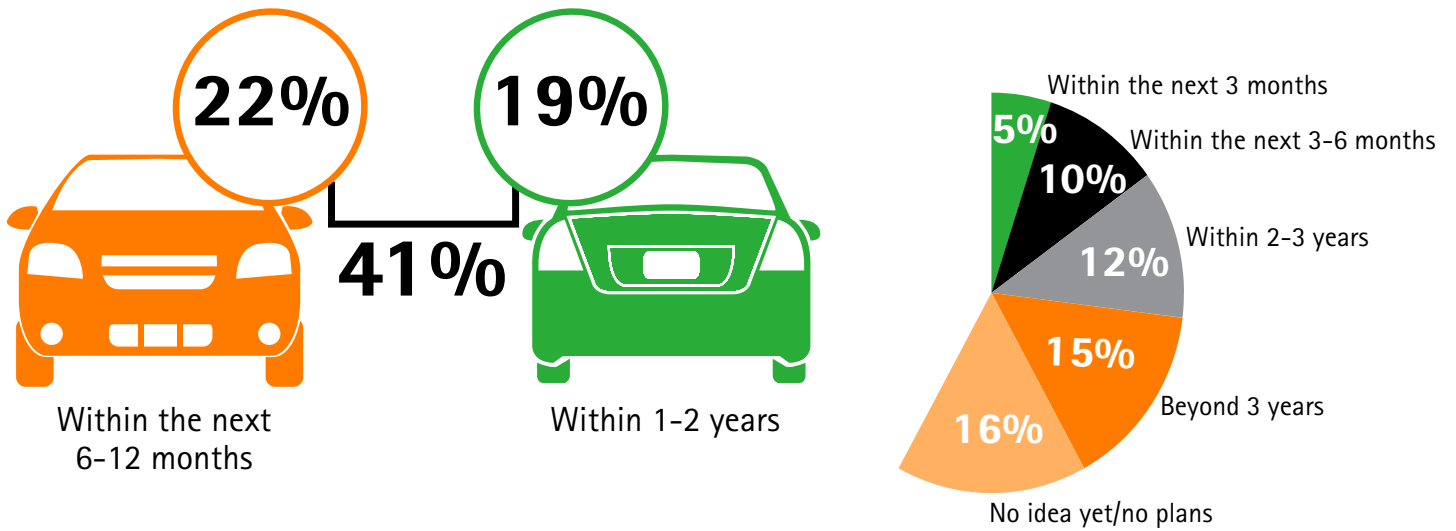Germany
10%

Japan
10%

United States
10%

France
10%

China
30%

Brazil
10%

India
10%

Italy
10%

Age Range

65+ 4%

18-24 12%

56-65 10%

25-35 27%

46-55 19%

36-45 28%
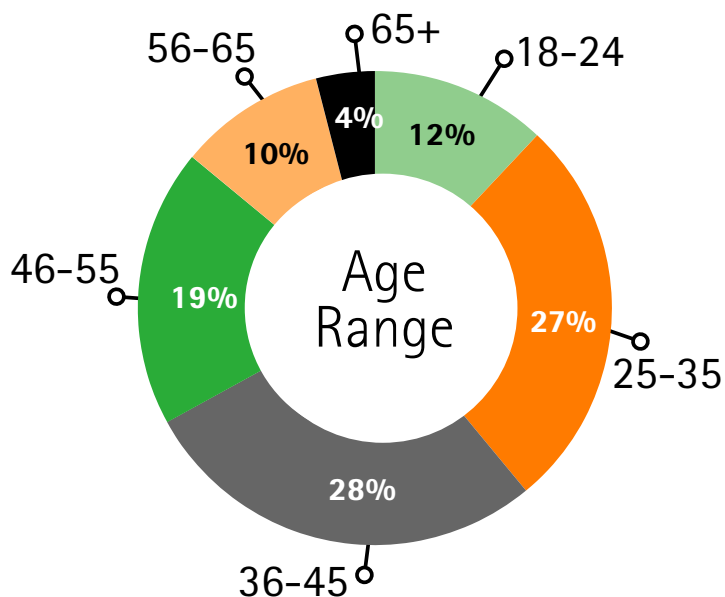
60%

40%

Have you leased, or purchased a new or old car?

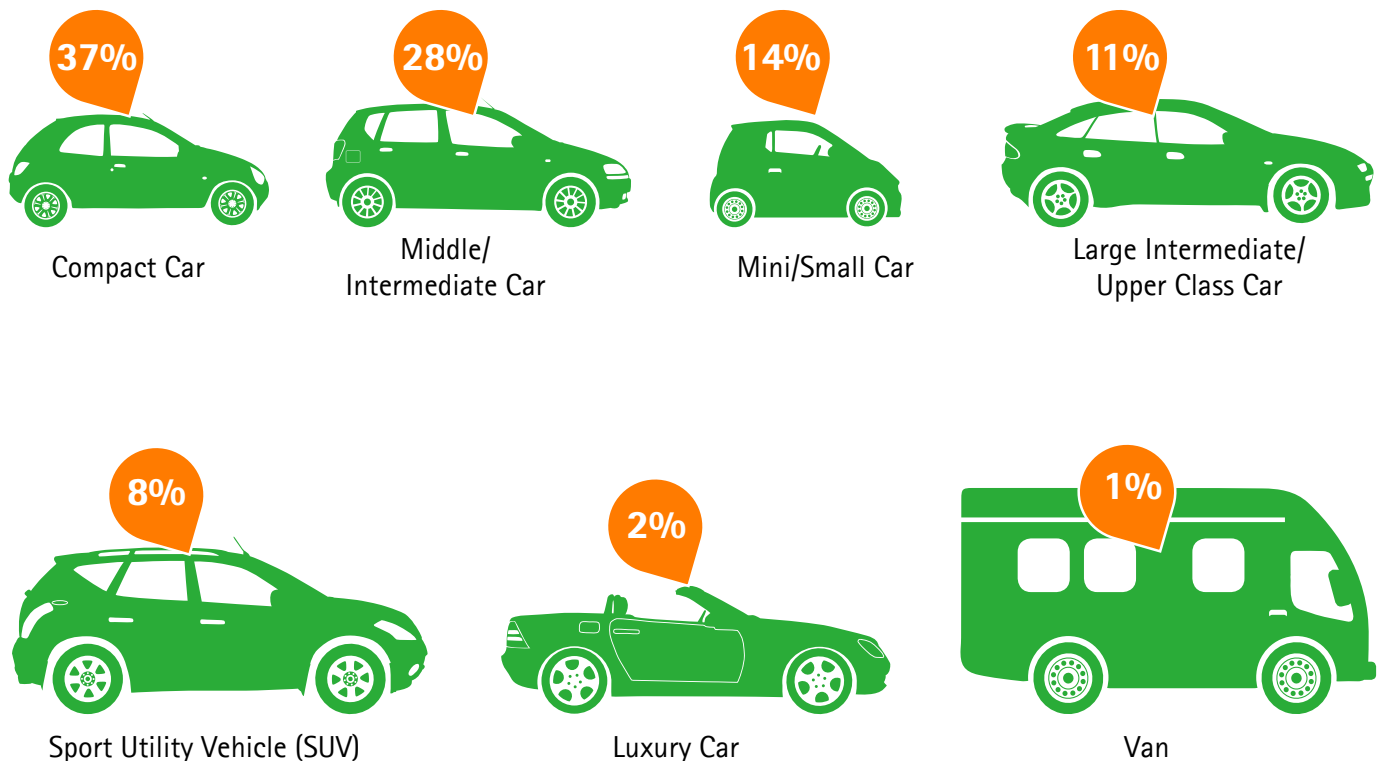**13%** Used

86% New

1% Leased

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

0012999
Average Miles

1% 50,001–70,000 miles / (80,001–112,000 km)

1% 40,001–50,000 miles / (64,001–80,000 km)

4% 30,001–40,000 miles / (48,001–64,000 km)

8% 20,001–30,000 miles / (32,001–48,000 km)

11% 15,001–20,000 miles / (24,001–32,000 km)

11% 12,001–15,000 miles / (19,201–24,000 km)

12% 10,001–12,000 miles / (16,001–19,200 km)

11% 9,001–10,000 miles / (14,001–16,000 km)

14% 7,001–9,000 miles / (11,201–14,400 km)

13% 5,001–7,000 miles / (8,001–11,200 km)

9% 3,001–5,000 miles / (4,801–8,000 km)

5% Up to 3,000 miles / 4,800 km

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

22%

Within the next 6–12 months

19%

Within 1–2 years

41%

- **5%** Within the next 3 months
- **10%** Within the next 3–6 months
- **12%** Within 2–3 years
- **15%** Beyond 3 years
- **16%** No idea yet/no plans

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

37%
Compact Car

28%
Middle/Intermediate Car

14%
Mini/Small Car

11%
Large Intermediate/Upper Class Car

8%
Sport Utility Vehicle (SUV)
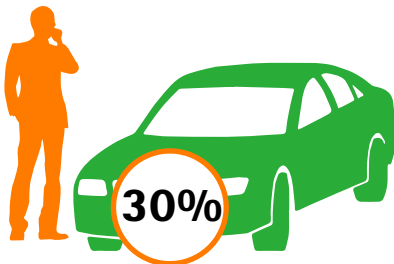
2%
Luxury Car

1%
Van

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

37%
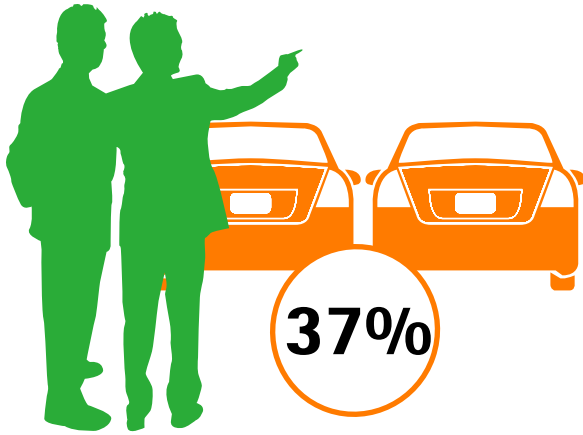
Salesman/visiting the dealership in person
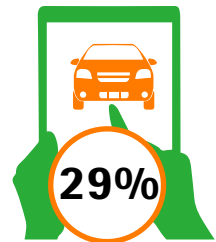
32%
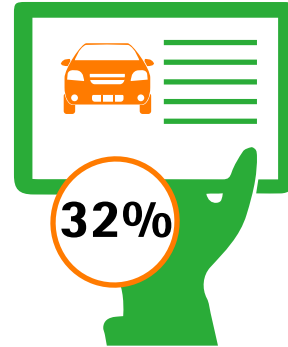
Automotive sites/reading online publications of car magazines
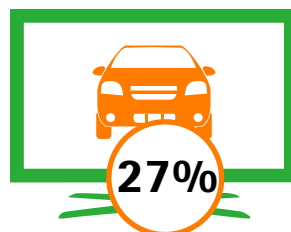
30%

Car (wanting or needing to buy a new vehicle)

29%

Seeking advice/ recommendations from family/friends or colleagues
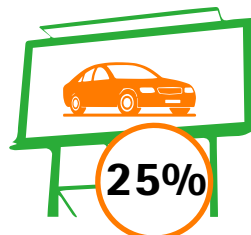
29%

Manufacturers' websites

28%

Dealer websites

27%

TV reviews

27%

Social media such as Facebook and Twitter/customer feedback
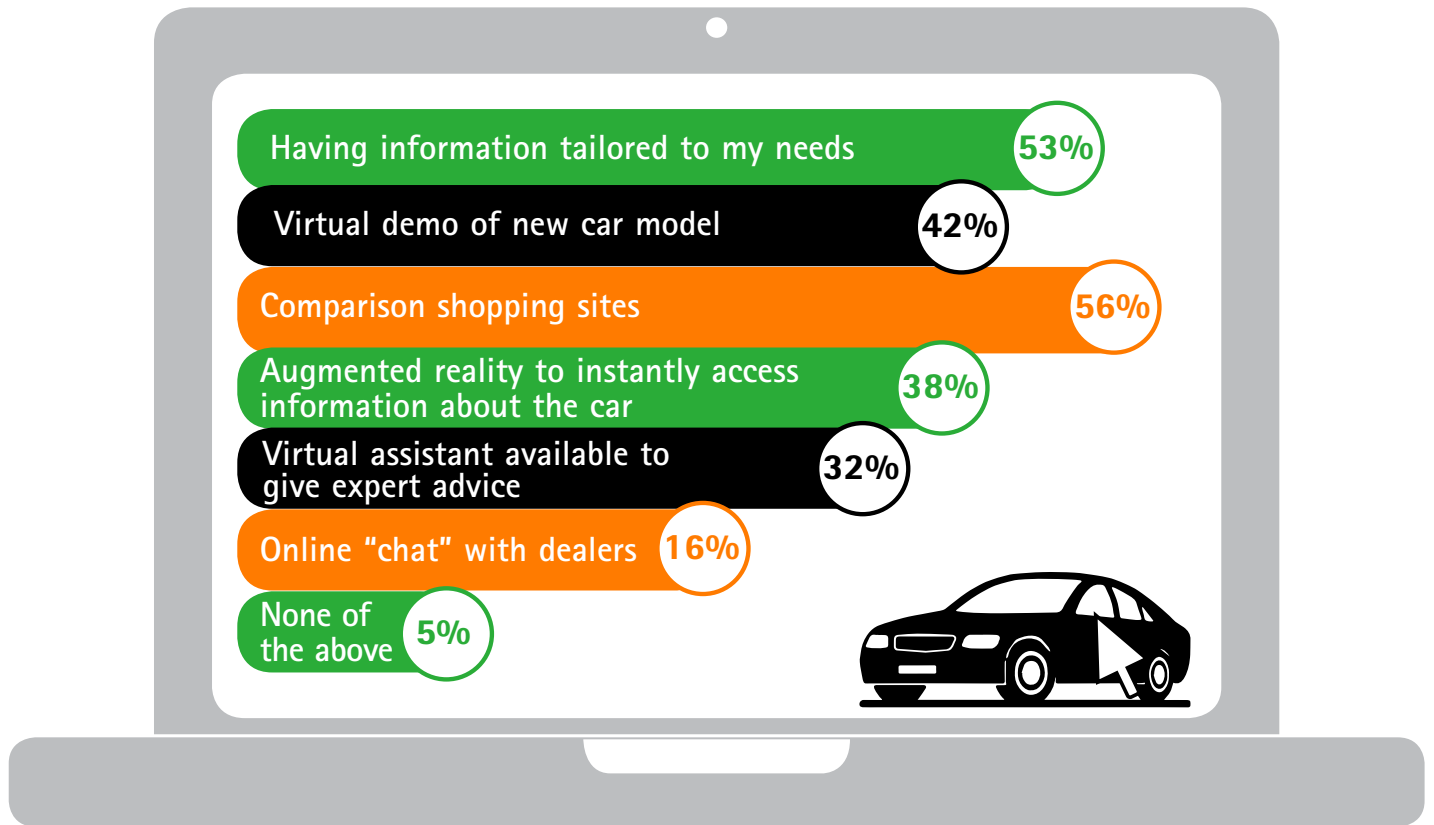
26%

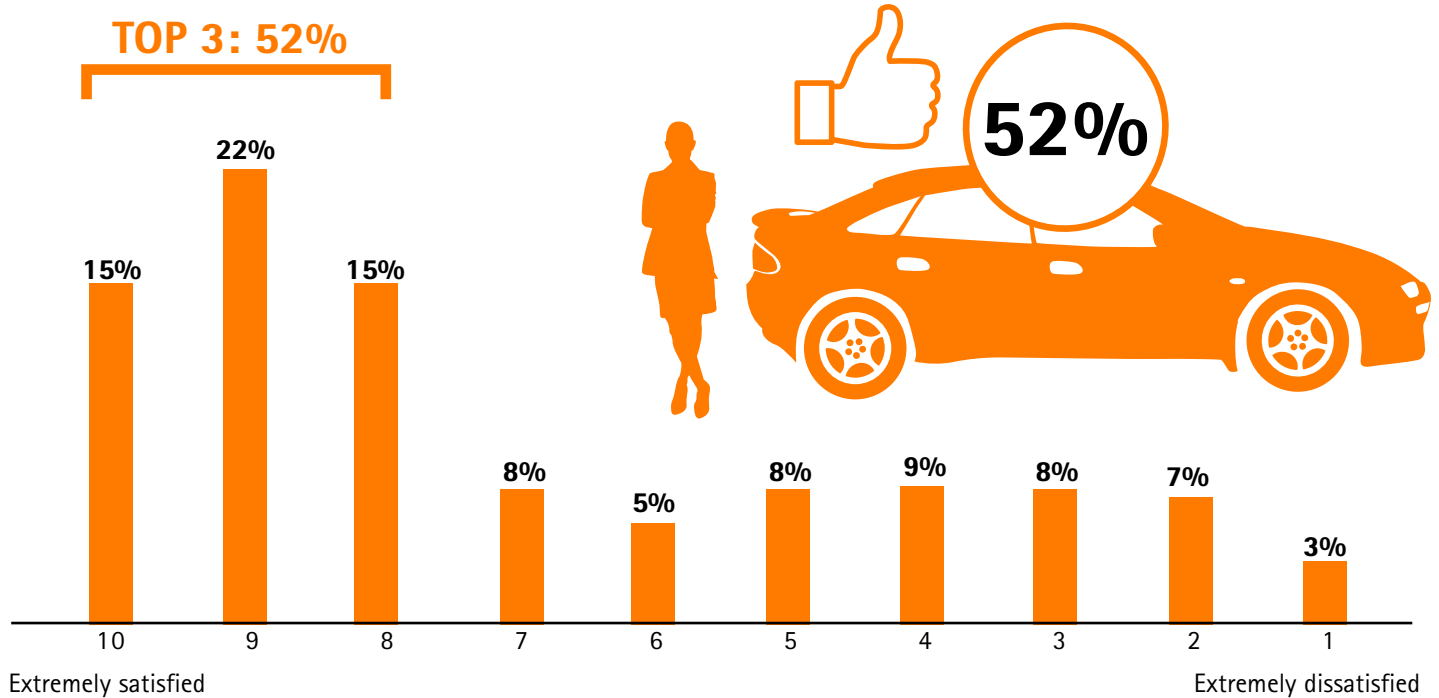Offline information

25%

Manufacturer advertisements

25%
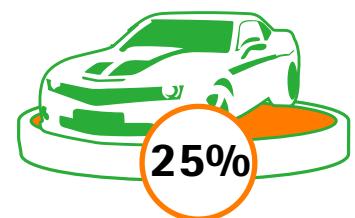
Motor shows

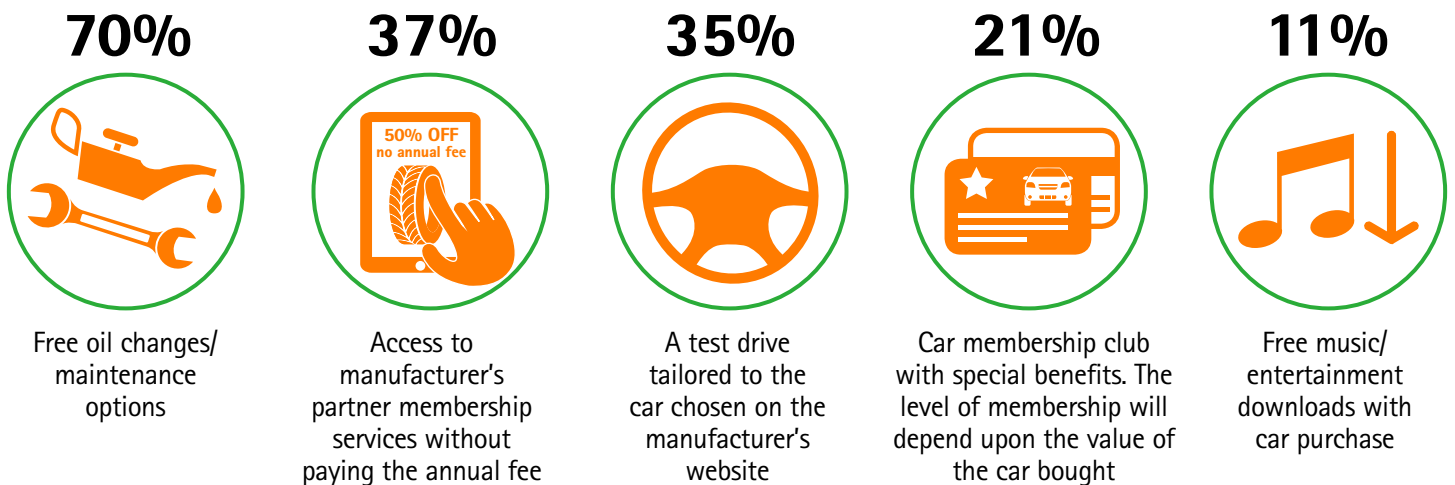# Which of the following would help make the process of researching for a new car via online channels easier?

- Having information tailored to my needs — **53%**
- Virtual demo of new car model — **42%**
- Comparison shopping sites — **56%**
- Augmented reality to instantly access information about the car — **38%**
- Virtual assistant available to give expert advice — **32%**
- Online "chat" with dealers — **16%**
- None of the above — **5%**

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

40% I visit a dealer, do additional manufacturer and third party web based research and then make my decision

35% I narrow down the choice to one or two cars via manufacturers web information and then go to the dealer

13% I do my initial research through social media (people's reviews/comments) then go to the dealer

5% I do not use the website at all – I just visit the dealer and trust his/her advice

7% I do my research and then call the qualified call center to book a test drive

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?

TOP 3: 52%

52%

Rating	Percentage
10	15%
9	22%
8	15%
7	8%
6	5%
5	8%
4	9%
3	8%
2	7%
1	3%

10 — Extremely satisfied

1 — Extremely dissatisfied

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

70%
Free oil changes/maintenance options

37%
Access to manufacturer's partner membership services without paying the annual fee

35%
A test drive tailored to the car chosen on the manufacturer's website

21%
Car membership club with special benefits. The level of membership will depend upon the value of the car bought

11%
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?
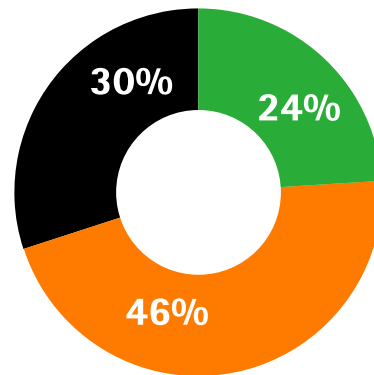
- **24%** Yes definitely
- **46%** Yes possibly
- **30%** No

Which special offers or valued customer services would you like to receive after you have completed the purchase of your new car?
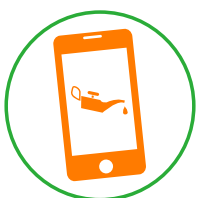
70% Discounts on car insurance

70% Discounts on fuel

48% Manufacturer and third partner specials offers throughout the year

38% Remote check of my car and a software update

36% Mobile phone reminders for annual service checks

31% Personal pick up service from my house to dealership for servicing

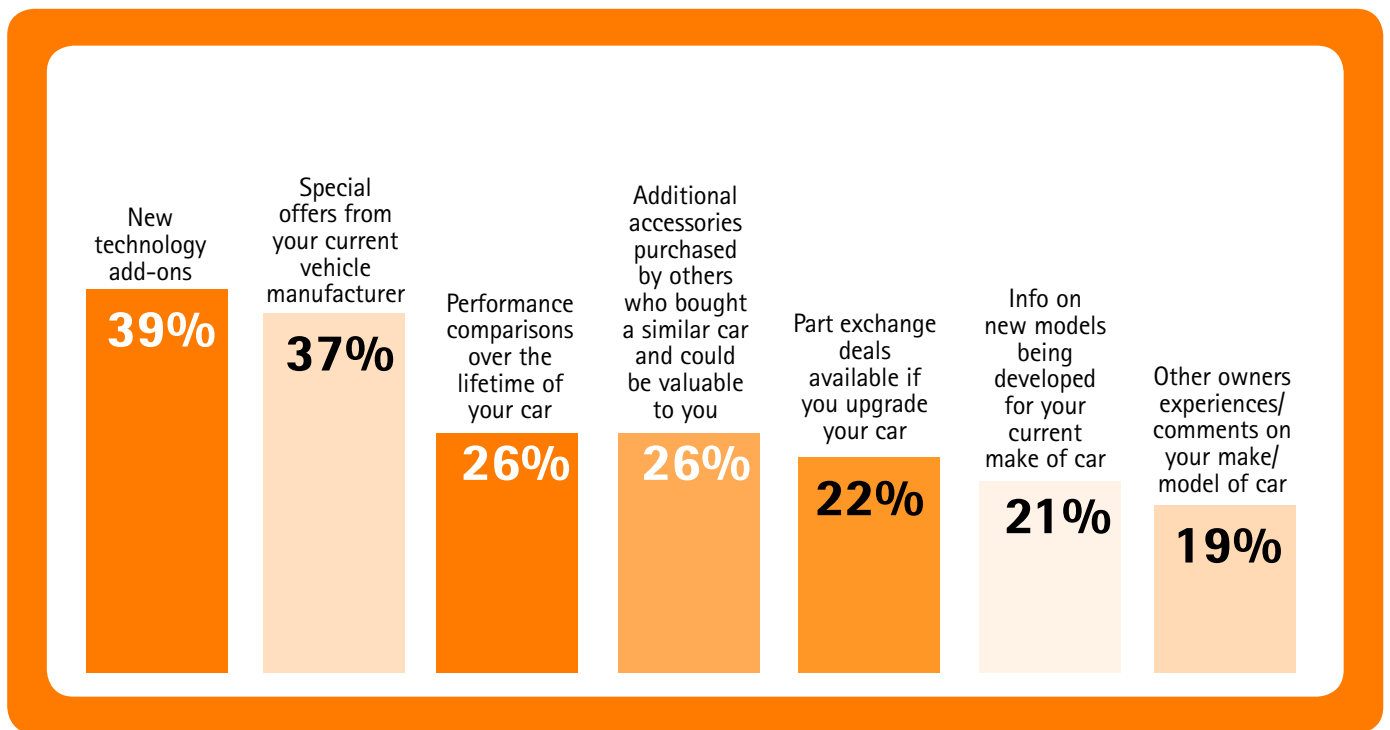**21%** Discount travel offers

8% 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?

**69%**
Special maintenance service offers

New technology add-ons
39%

Special offers from your current vehicle manufacturer
37%

Performance comparisons over the lifetime of your car
26%

Additional accessories purchased by others who bought a similar car and could be valuable to you
26%

Part exchange deals available if you upgrade your car
22%

Info on new models being developed for your current make of car
21%

Other owners experiences/ comments on your make/ model of car
19%

How appealing or unappealing are the following digital customer experiences at your local dealership/showroom?
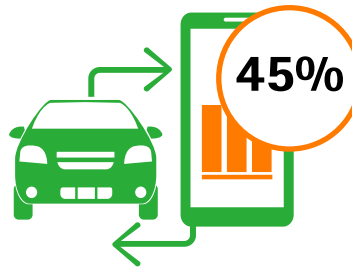
52% — Wi-Fi hotspot in car
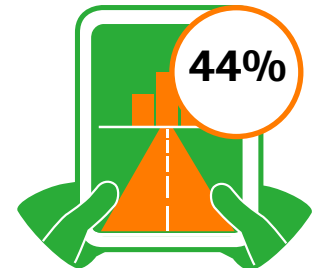
52% — Info on digital security options
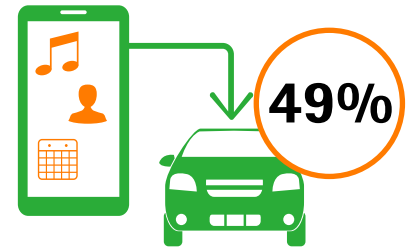
49% — Transfer from mobile to car features–all music, contacts, calendars, etc
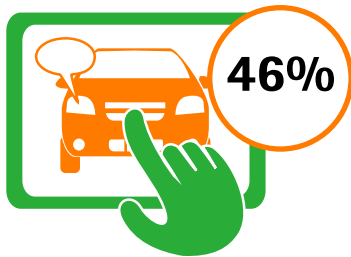
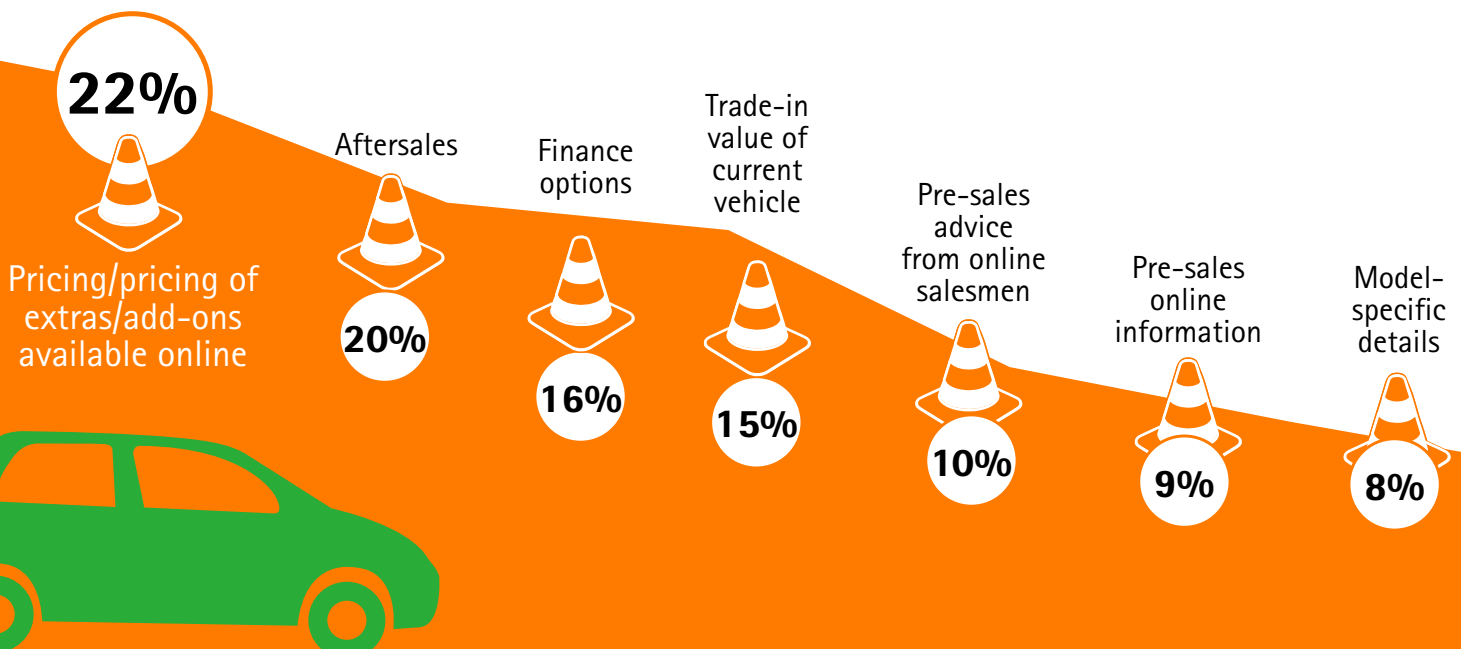**46%** — Interactive touch display at dealership to get car information

45% — Ability to transfer data to and from your mobile device

44% — Virtual test drive

Summary of appealing digital experiences

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

22% — Pricing/pricing of extras/add-ons available online

20% — Aftersales

16% — Finance options

15% — Trade-in value of current vehicle

10% — Pre-sales advice from online salesmen

9% — Pre-sales online information

8% — Model-specific details

How would you see your digital/online experience of buying a car change in next 3-5 years?

45% 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

**19%** Customers will be able to buy, finance and have a car delivered completely via an online interaction

17% 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

7% Car purchases will be viable with the click on your phone/mobile
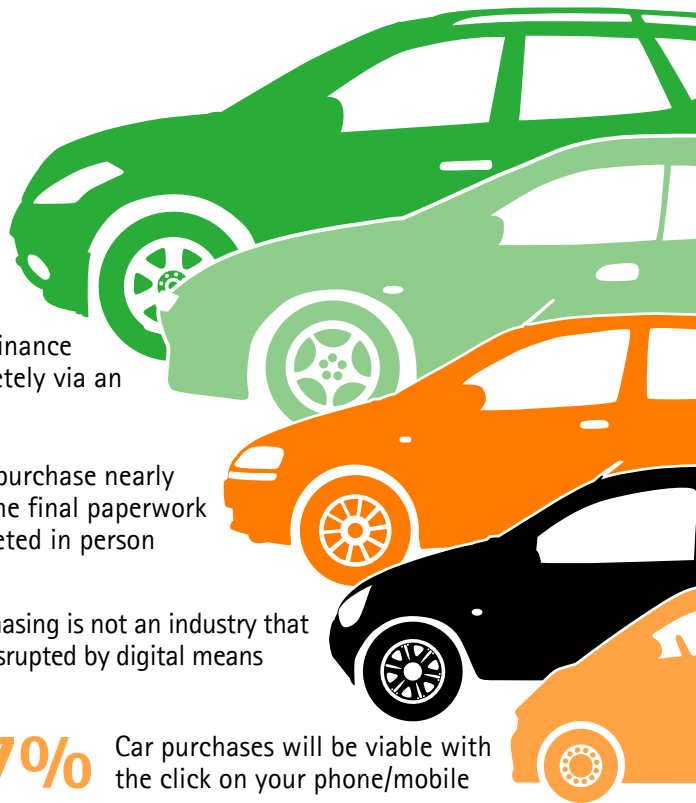
If you purchased a car directly online, which of the following parts of the overall traditional buying process would you miss?

51% Reviewing the models in person

45% Negotiating with the salesperson on price

36% The test drive

30% Contact/Additional insight from the dealer

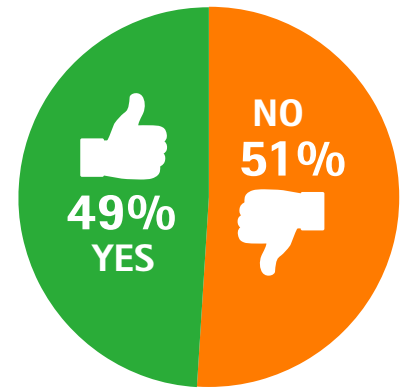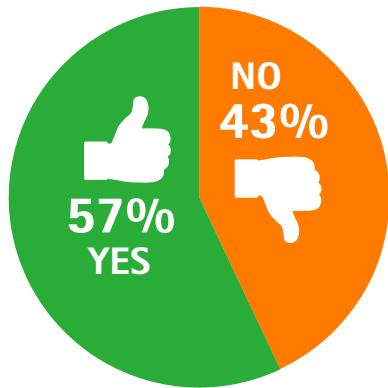**30%** Understanding the full options list

29% Negotiating with the sales person on trade in

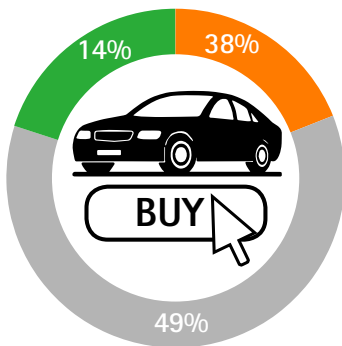**13%** The feeling of excitement in the showroom

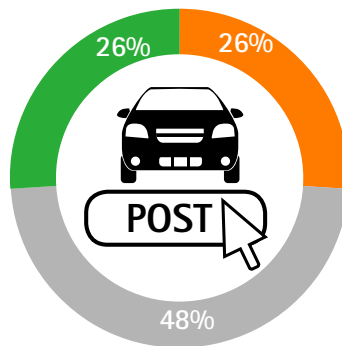# Would you be interested in online auctions to buy a new car?

57% YES
NO 43%

SOLD

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

49% YES
NO 51%

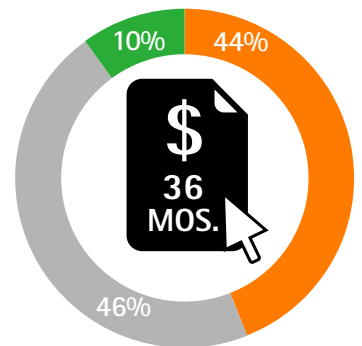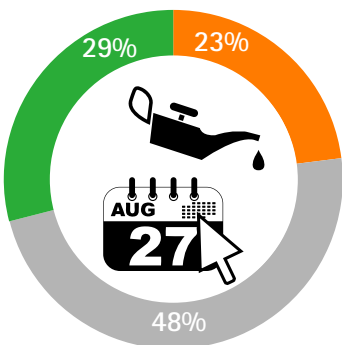# Which of the following have you already done online and which would you consider?

14% | 38%
49%
BUY
Bought a new car

26% | 26%
48%
POST
Sold an old car
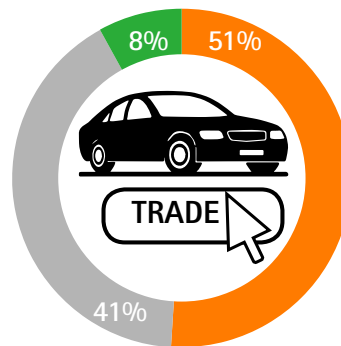
8% | 51%
41%
TRADE
Traded in an old car

10% | 44%
46%
$ 36 MOS.
Organized financing for a car

29% | 23%
48%
AUG 27
Booked a service for your car
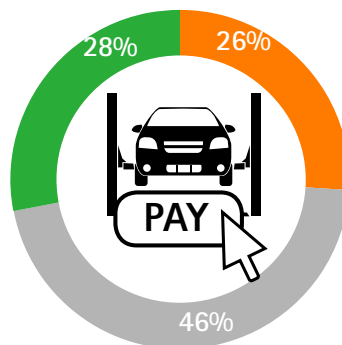
28% | 26%
46%
PAY
Paid for your car service
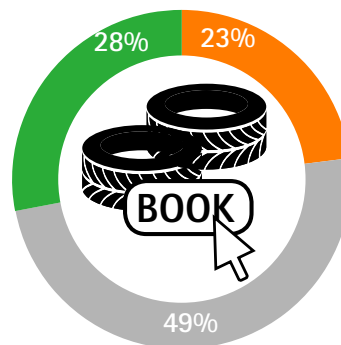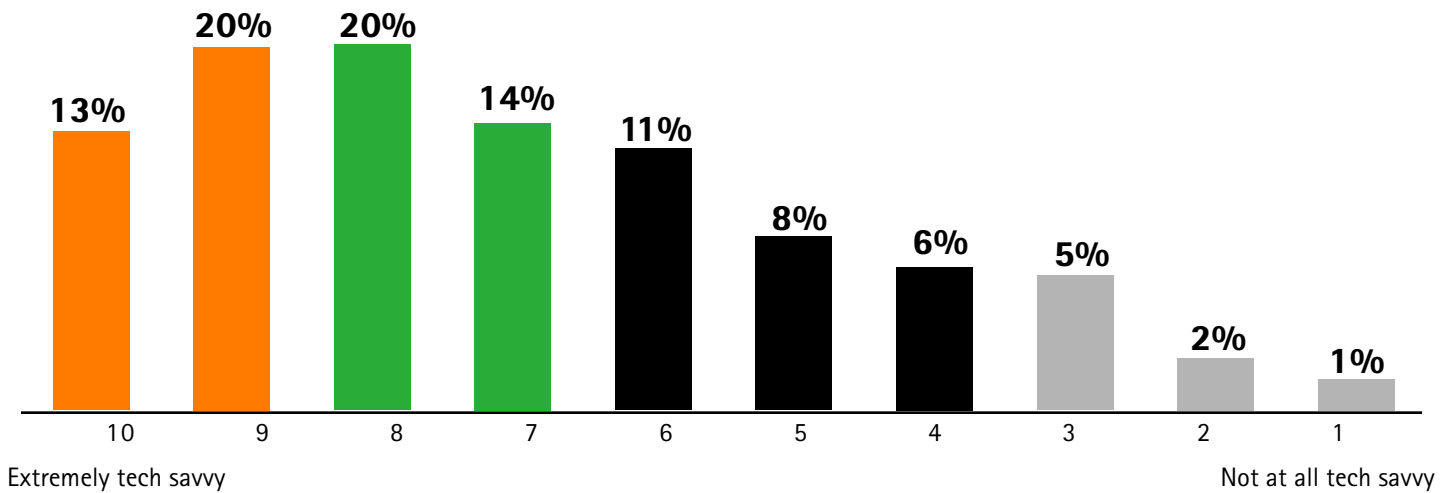
28% | 23%
49%
BOOK
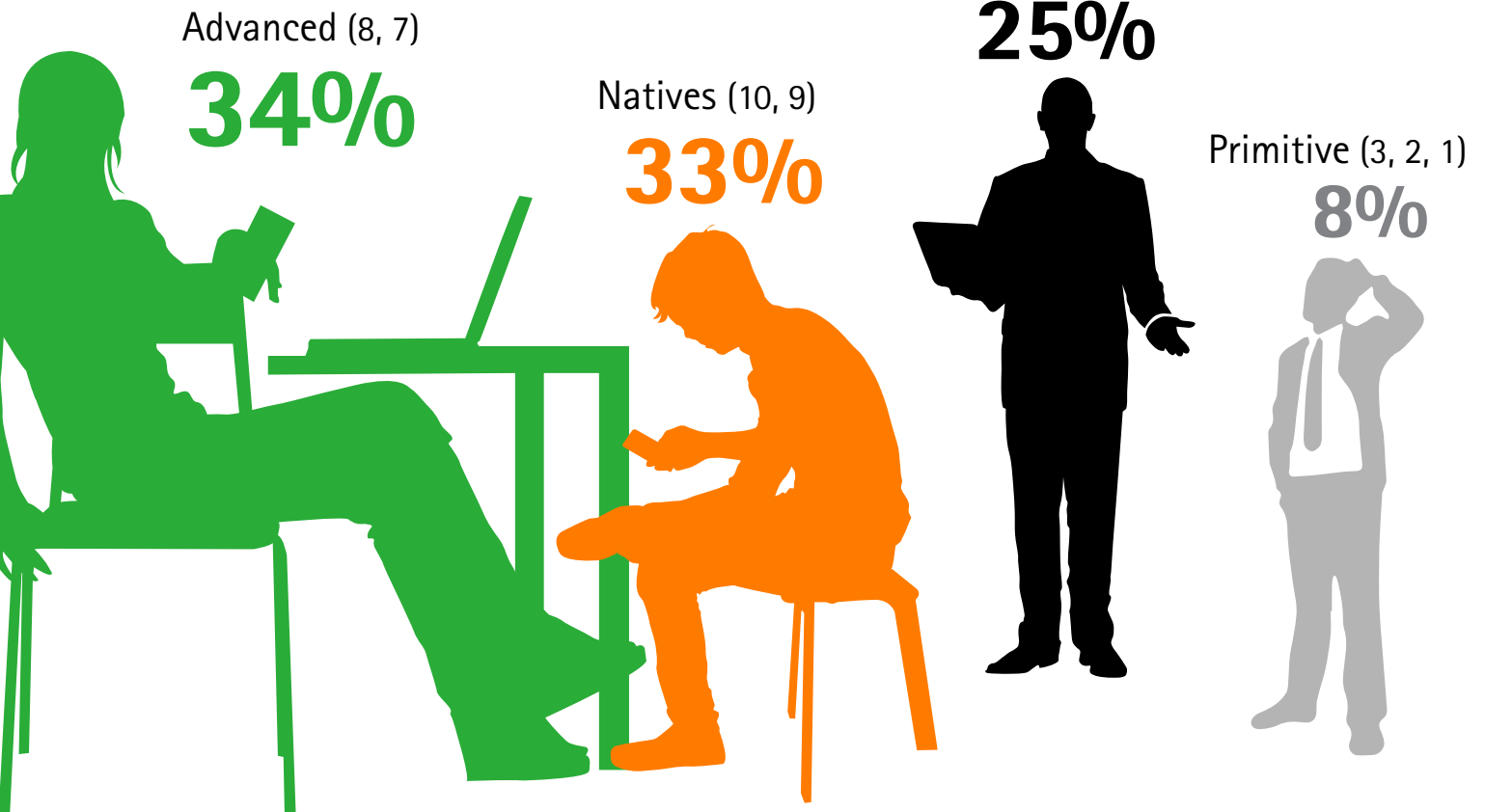Bought tires and organized fitting
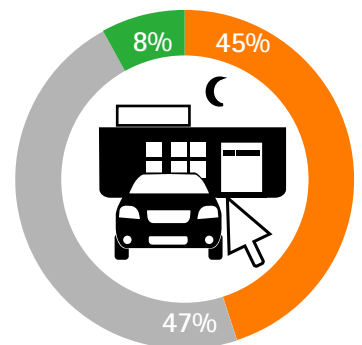
8% | 45%
47%
Organized a pickup out of hours after a service

● 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?

10	9	8	7	6	5	4	3	2	1
13%	20%	20%	14%	11%	8%	6%	5%	2%	1%

Extremely tech savvy

Not at all tech savvy

Summary

Advanced (8, 7)
34%

Natives (10, 9)
33%

Beginners (6, 5, 4)
25%

Primitive (3, 2, 1)
8%

About Accenture

Accenture is a global management consulting, technology services and outsourcing company, with approximately 319,000 people serving clients in more than 120 countries. Combining unparalleled experience, comprehensive capabilities across all industries and business functions, and extensive research on the world's most successful companies, Accenture collaborates with clients to help them become high-performance businesses and governments. The company generated net revenues of US$30.0 billion for the fiscal year ended Aug. 31, 2014. Its home page is www.accenture.com.