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# The Value of Auto Website Visitors Who Don't Convert on Site

Understanding the Value of Search Referrals that Do Not Result in a Key Purchase Indicator

Google/Compete  
U.S., April 2009

# Purpose of Study & Methodology

## Purpose of Study

To develop clickstream-driven insights complemented with survey responses to quantify the value of search referrals to OEM sites that do not lead to an immediate or 30 day lagged Key Purchase Indicator activity. Specifically, the study will:

- Quantify the Role of Search in driving other on-site automotive behaviors
- Describe the difference in consumer profile between a KPI and a non-KPI consumer

## Methodology

Using its online panel of 2 million U.S. consumers, Compete observed consumers who visited the leading OEM sites (see next slide for list of sites)

Further, Compete classified these consumers into a KPI and non-KPI segment, based on their activity on the OEM site in the 30 days after being referred from search

Survey sample size: KPI = 312; Non-KPI = 165

**Q: What is the value in search referrals that do not result in KPI activity?**

# KPI segment definition

KPI activity on leading OEM sites was observed between October 2008 to January 2009

Consumers who exhibited KPI behavior immediately after their search referral to the OEM site or within 30 days were classified as KPI consumers

## KPI Activity

- Build-Your-Own/Configurator
- Locate a Dealer
- Request a Quote
- Vehicle Comparison
- Incentives and rebates
- Request a Brochure
- Trade in Value
- Search Inventory

## Example: Visitor visits an OEM site from search on October 7, 2008

Oct-08

Nov-08

Dec-08

Jan-09



30 day window observed  
for KPI activity

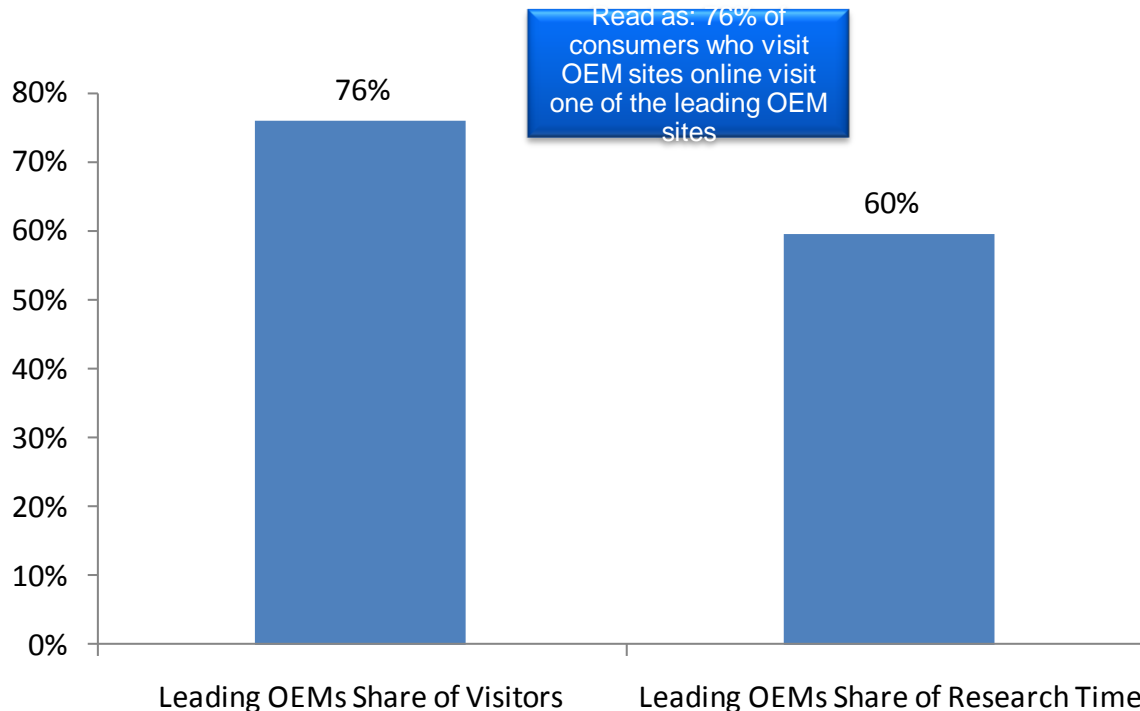


# Leading OEM brands capture 76% of total OEM site traffic and 60% of their research time

- In aggregate, OEM sites attract approximately 12 million unique visitors per month

## Leading OEM Brand Share of Online Automotive Research

(Clickstream data; % of Total Unique Visitors and Time Spent on OEM Sites, October-December 2008)



Make	Oct - Dec 2008 Retail Sales
Toyota	293,506
Honda	211,192
Ford	202,752
Chevrolet	194,435
Nissan	107,552
Dodge	89,458
GMC	57,111
Jeep	53,028
Hyundai	51,771
Lexus	49,101

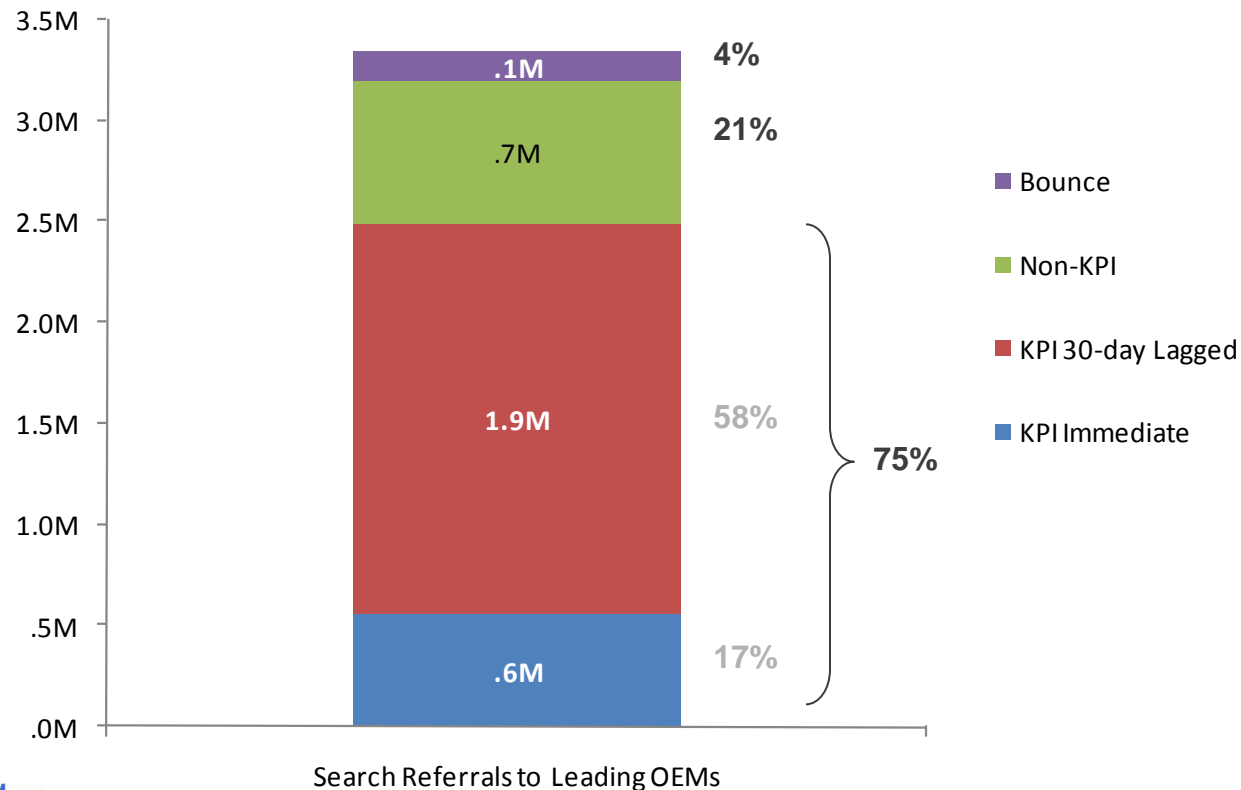
Source: Polk Retail Registrations

# 21% of 3.3M monthly search referring sessions to leading OEM brand sites result in a Non-KPI activity

3 of 4 monthly search referring sessions result in a KPI activity either immediately or within 30 days

## Search Referral Volume to Leading OEM Sites

(Clickstream data; Referring Sessions, October-December 2008 Monthly Average)



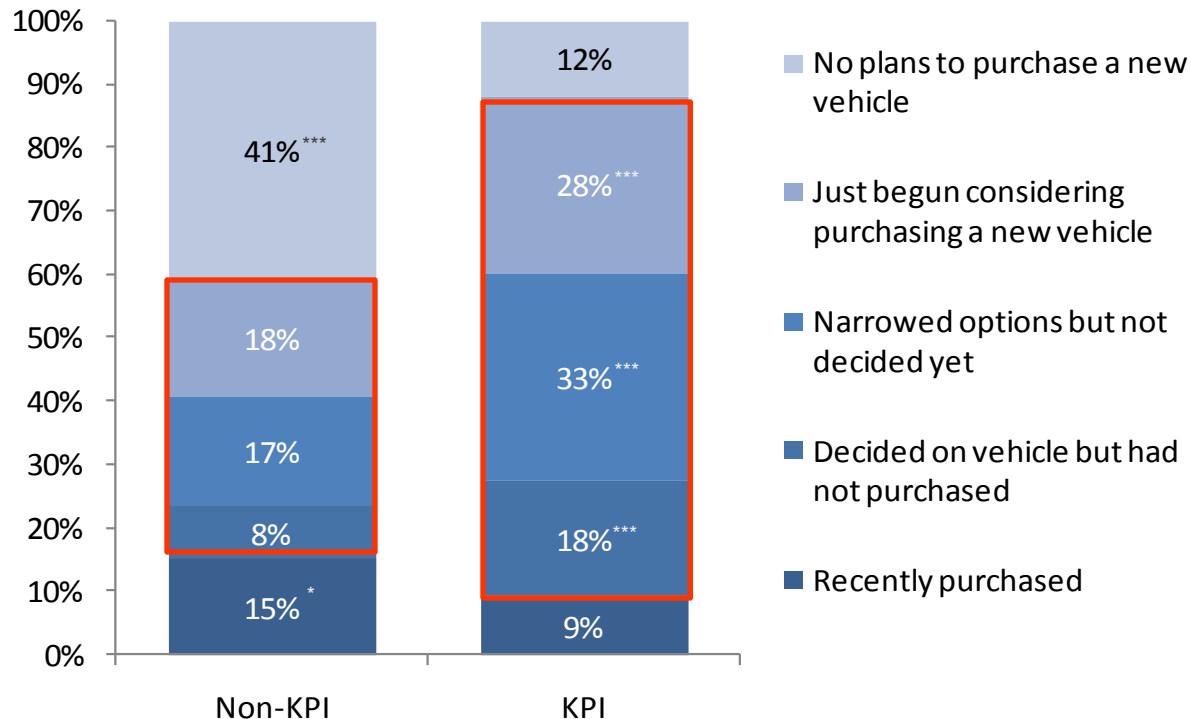
# Nearly 1 in 2 consumers who do not exhibit KPI activity on OEM sites are in the process of purchasing a vehicle

25% of Non-KPI consumers have begun to narrow vehicle options or decided on the vehicle they would like to purchase (mid to lower funnel)

18% of Non-KPI consumers have begun considering purchasing a vehicle (upper funnel)

## Stage in Auto Purchasing Decision

(Survey Results; Non-KPI=165, KPI=312)



\* = 80% statistically significant  
 \*\* = 90% statistically significant  
 \*\*\* = 95% statistically significant

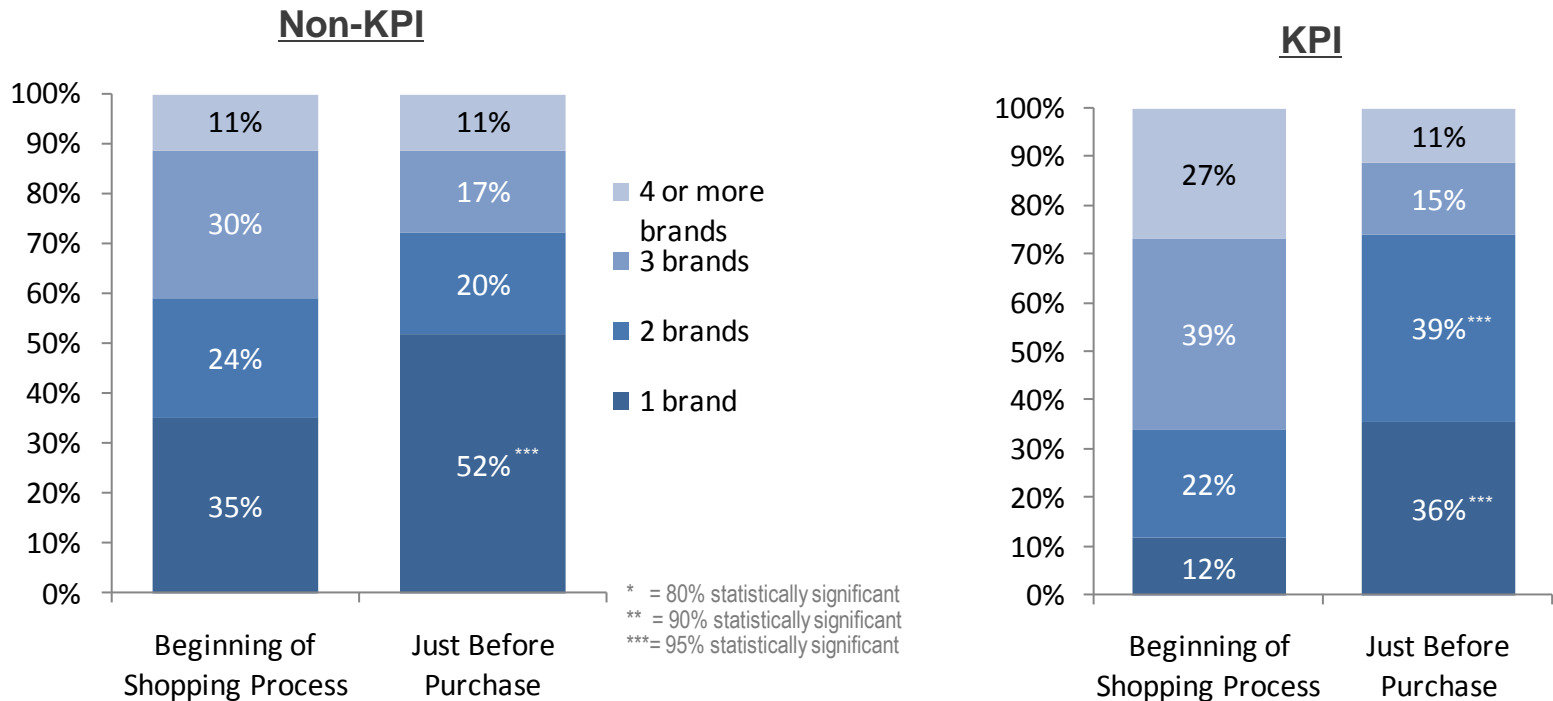
# Both Non-KPI and KPI consumers narrowed their consideration during their shopping process

A majority of consumers who do not exhibit KPI behavior online are considering only one brand just before purchase

75% of KPI consumers are considering only one or two brands just before purchase

## Number of Auto Brands Considered in Shopping Process

(Survey Results; Non-KPI=54, KPI=205)





# Non-KPI consumers are looking for general information on OEM sites

However, KPI consumers are more active on OEM sites.

A larger percentage of KPI consumers interact with Non-KPI activities than Non-KPI consumers

## Reasons Why Consumers Visit OEM Sites

(Survey Results; Non-KPI=165, KPI=312)

On-site Activities	Non-KPI	KPI
Research information about a certain model	37%	49%***
View pictures of a certain model	30%	53%***
Keep up with the latest trends and new models	20%	24%
Narrow my choices by learning more about the manufacturer's vehicle	13%	33%***
Read news about the company	7%	9%
Visit the owner section	6%	8%
Read press or news information about the company	6%	7%***
Research accessories for my car	5%	12%
Watch a video of a certain model	5%	10%
Research certified, pre-owned cars	2%	17%***
Find out about financing a vehicle	2%	12%***
Find out about non-automobile products	2%	3%
Find out about special deals, rebates or incentives	0%	44%
Configure a vehicle based on my particular option choices	0%	34%
Obtain a price quote	0%	32%
Utilize vehicle comparison tools	0%	24%
Locate a dealer	0%	24%
Find out which vehicles or products were in stock	0%	21%
Estimate a trade in value	0%	20%
Request a brochure	0%	12%

\* = 80% statistically significant

\*\* = 90% statistically significant

\*\*\*= 95% statistically significant

# Non-KPI consumers are less likely to consider themselves an expert in the auto industry

KPI shoppers are more likely to be auto enthusiasts

## KPI and Non-KPI Consumer Profile (Survey Results; Non-KPI=165, KPI=312)

	Non-KPI	KPI
Do not consider themselves an automotive expert	33%*	26%
Auto enthusiasts	35%	43%**
Keep tabs on the automotive space on a regular basis	35%	39%

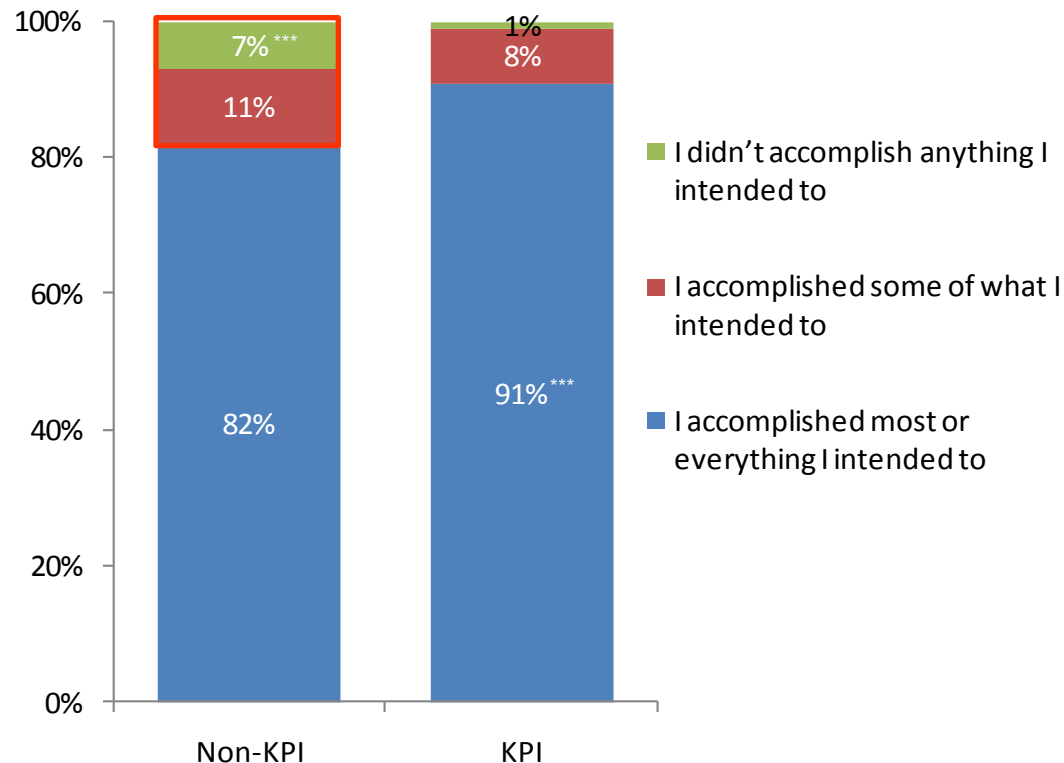
\* = 80% statistically significant  
\*\* = 90% statistically significant  
\*\*\*= 95% statistically significant

# More often, Non-KPI consumers have a more frustrating experience on OEM sites

- 7% of Non-KPI consumers did not finish what they intended to do on OEM sites
- 90% of KPI consumers accomplished most or everything they intended to do on OEM sites

## Result of OEM Site Visit

(Survey Results; Non-KPI=115, KPI=231)

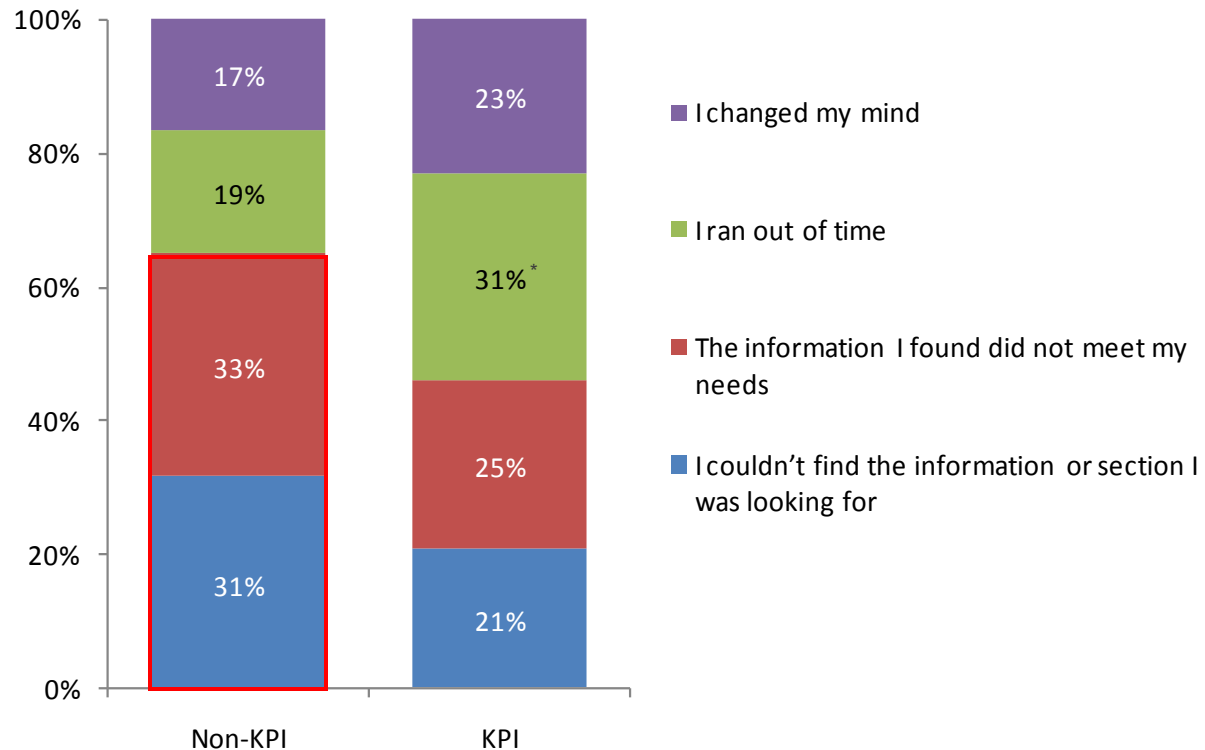


\* = 80% statistically significant  
\*\* = 90% statistically significant  
\*\*\* = 95% statistically significant

# Lack of information and the difficulty in finding it are the top reasons consumers cannot do what they intend to on OEM sites

## Reasons for Not Accomplishing Site Intent

(Survey Results; Non-KPI=34<sup>^</sup>, KPI=73)



\* = 80% statistically significant  
\*\* = 90% statistically significant  
\*\*\* = 95% statistically significant

<sup>^</sup> = Use sample under 50 as directional

Source: Google/Compete 2009 Non-KPI Study

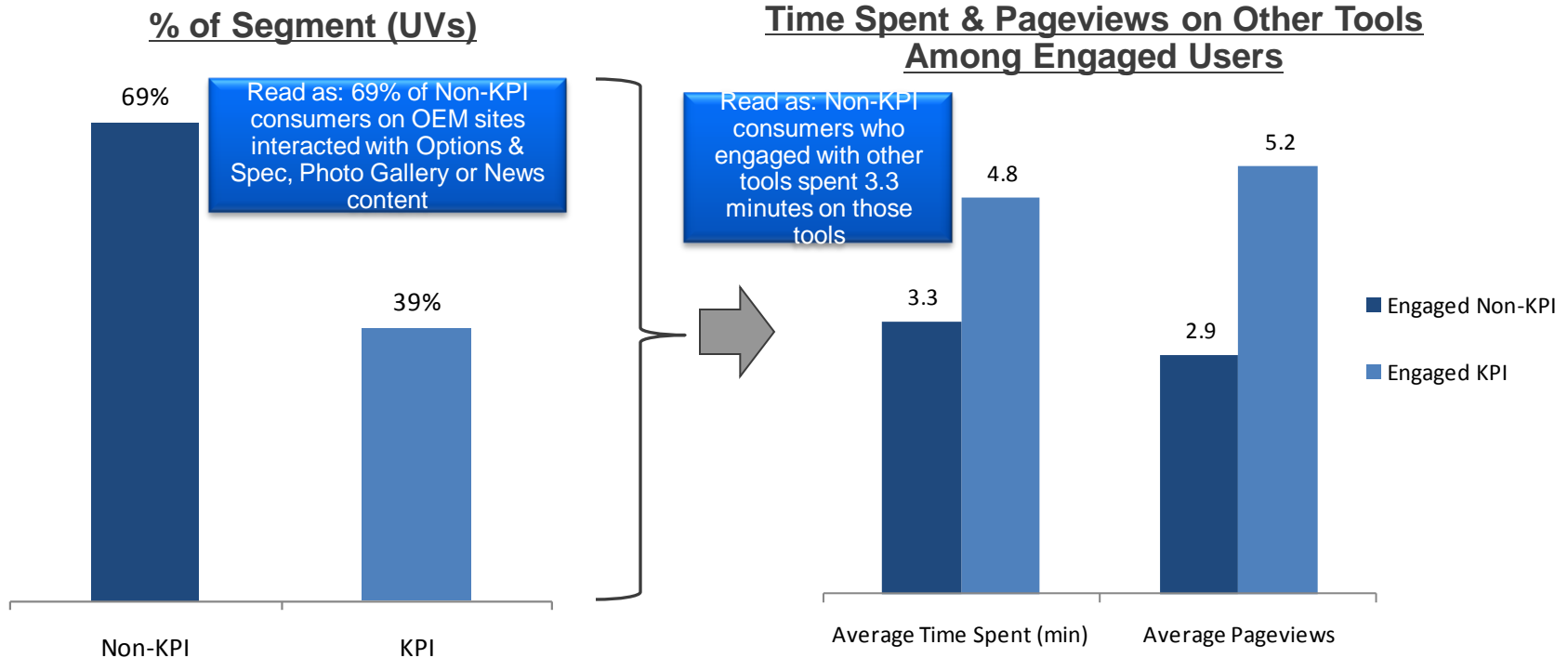
Q6: Why were you not able to accomplish everything you set out to at <site>?

# Nearly 70% of consumers who do not exhibit KPI behavior on OEM sites engage in other onsite activities

Although Non-KPI consumers are more likely to interact with other onsite activities, they are less engaged than KPI shoppers who spend more time and view more pages on the same parts of the site

## Usage and Engagement With Other OEM Onsite Tools\*

(Clickstream data; % of Unique Visitors, October-December 2008 Monthly Average)



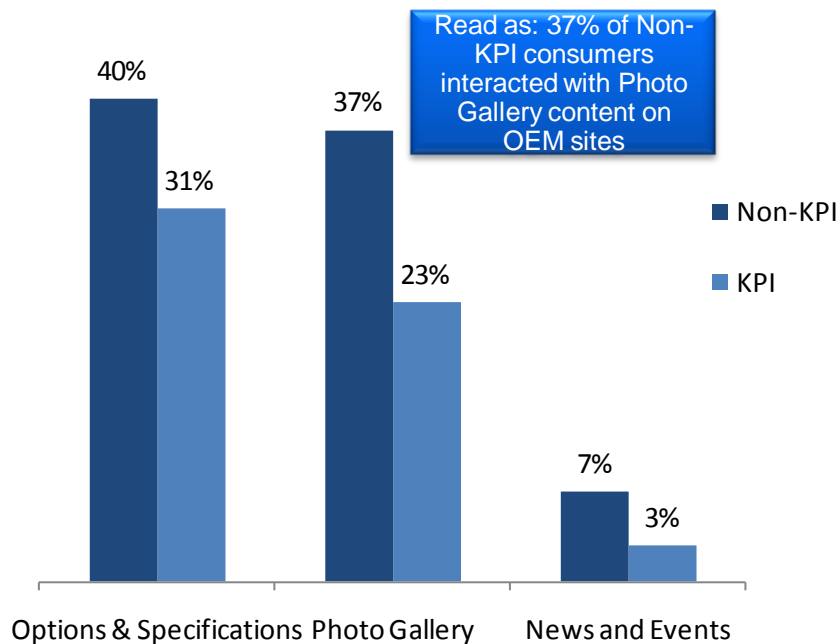
# A higher percentage of Non-KPI consumers visit other parts of OEM sites like Options & Specifications, Photo Gallery and News

However, KPI consumers are more engaged with these sections of OEM sites

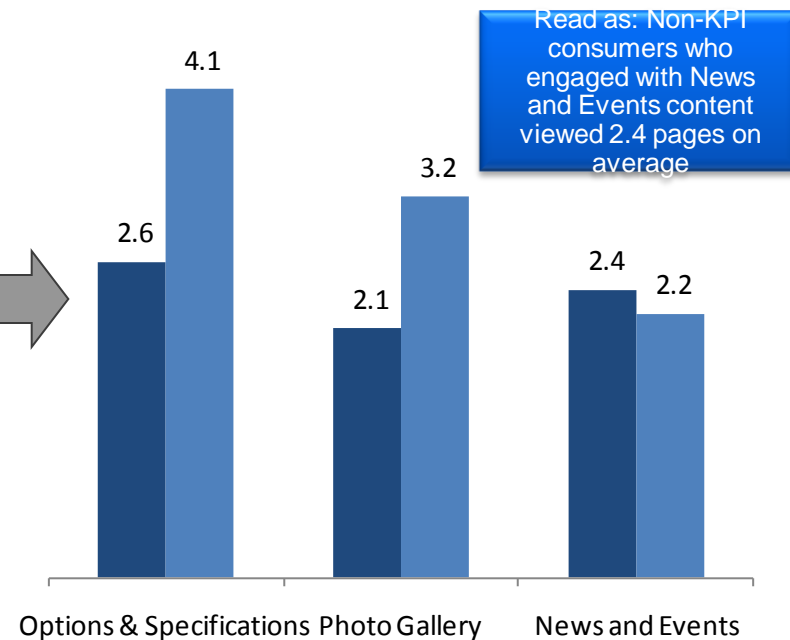
## Detailed Usage of Other OEM Onsite Tools

(Clickstream data; % of Unique Visitors, October-December 2008 Monthly Average)

% of Segment (UVs)



Pageviews per User on Other Tools



# Non-KPI automotive shopping behavior differs from KPI consumers in site visitation and models shopped

- Non-KPI consumers shop one fewer model and visit about 2.5 fewer automotive sites in total

## KPI and Non-KPI Online Behavior Profile

(Clickstream data; October-December 2008 Monthly Average)

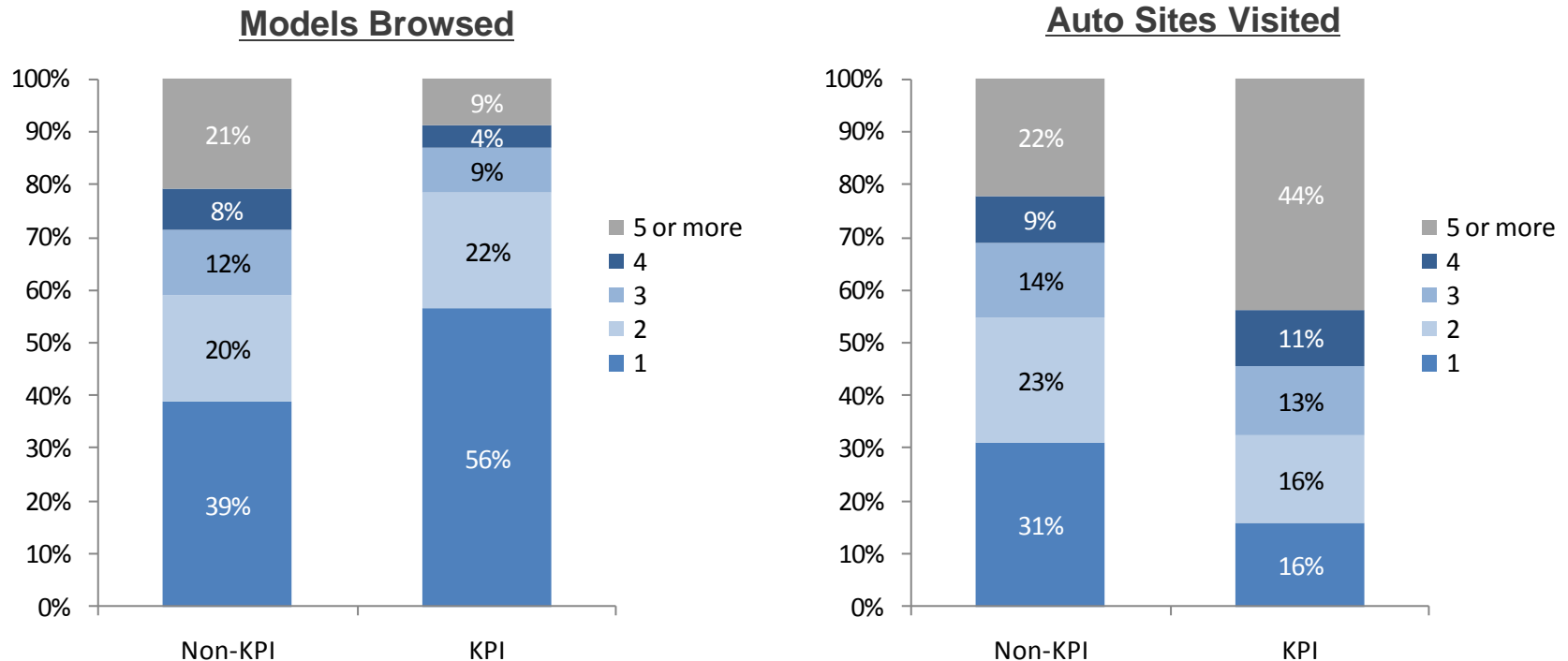
	Non-KPI	KPI
Average Number of Daily Searches across Internet	6.5	6.4
Branded Search Term Usage	90%	90%
Monthly Visits to OEM site from Search	1.6	2.3
Number of Models Browsed	2.1	3.6
Number of Total Automotive Sites Visited	3.3	5.7

# Non-KPI consumers exhibit behavior typical of upper funnel auto shopping whereas KPI consumers exhibit lower funnel behavior

- 61% of Non-KPI consumers browsed more than one vehicle on average
- 1 of 2 KPI consumers browsed only one model on average

## Models Browsed and Auto Sites Visited\*

(Clickstream data; October-December 2008 Monthly Average)



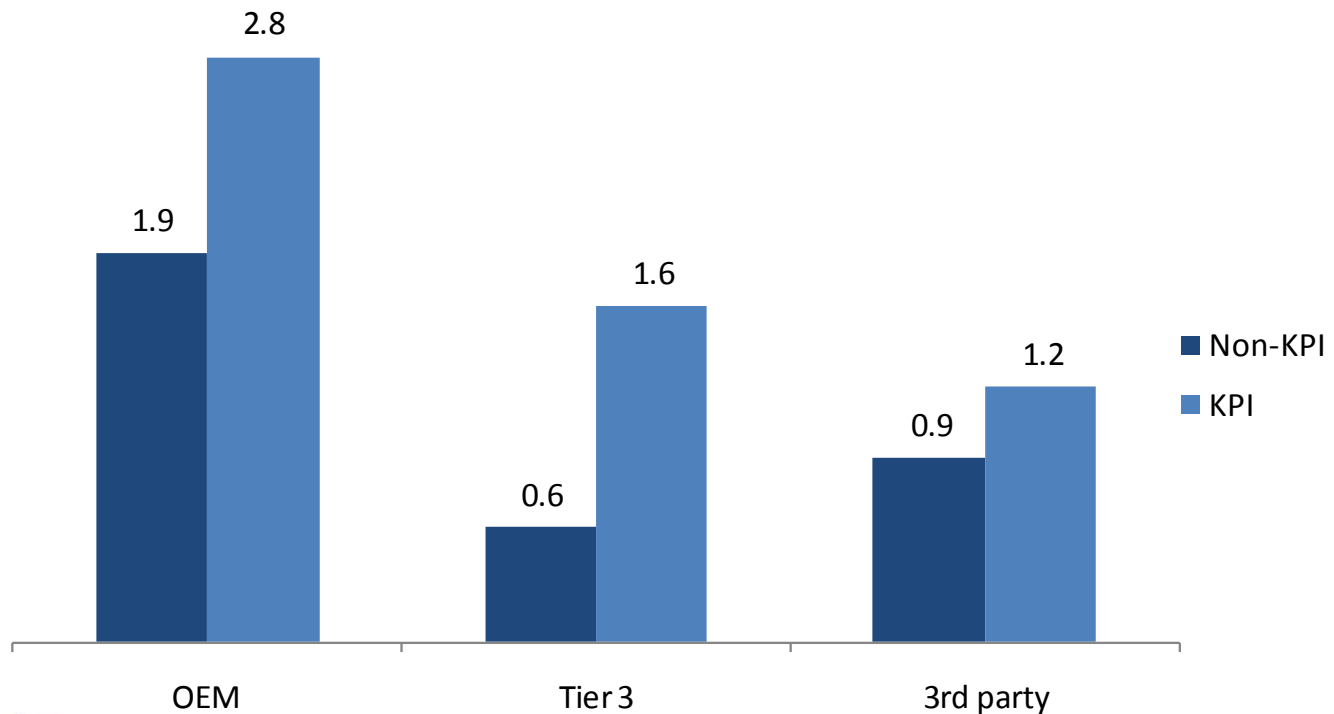


# Non-KPI shoppers visit fewer sites in the automotive category

Tier 3 site visitation varies the most between Non-KPI consumers and KPI consumers

## Other Site Visitation

(Clickstream data; Average # of Sites Visited per User, October-December 2008 Monthly Average)

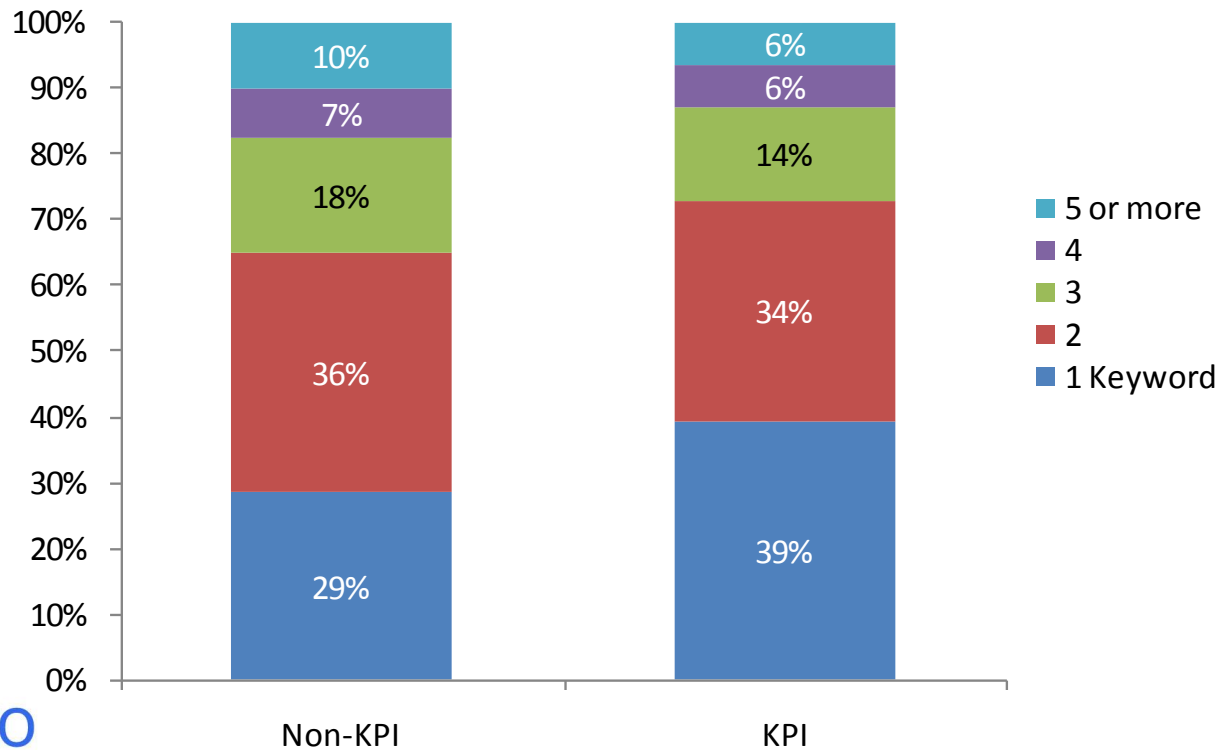


# Non-KPI consumers use more searches with multiple keywords

KPI consumers are more brand heavy searchers with the bulk of their single keyword searches containing brand terms

## Number of Keywords Used in Search Terms for OEM Referrals

(Clickstream data; % of Search Queries, October-December 2008 Monthly Average)

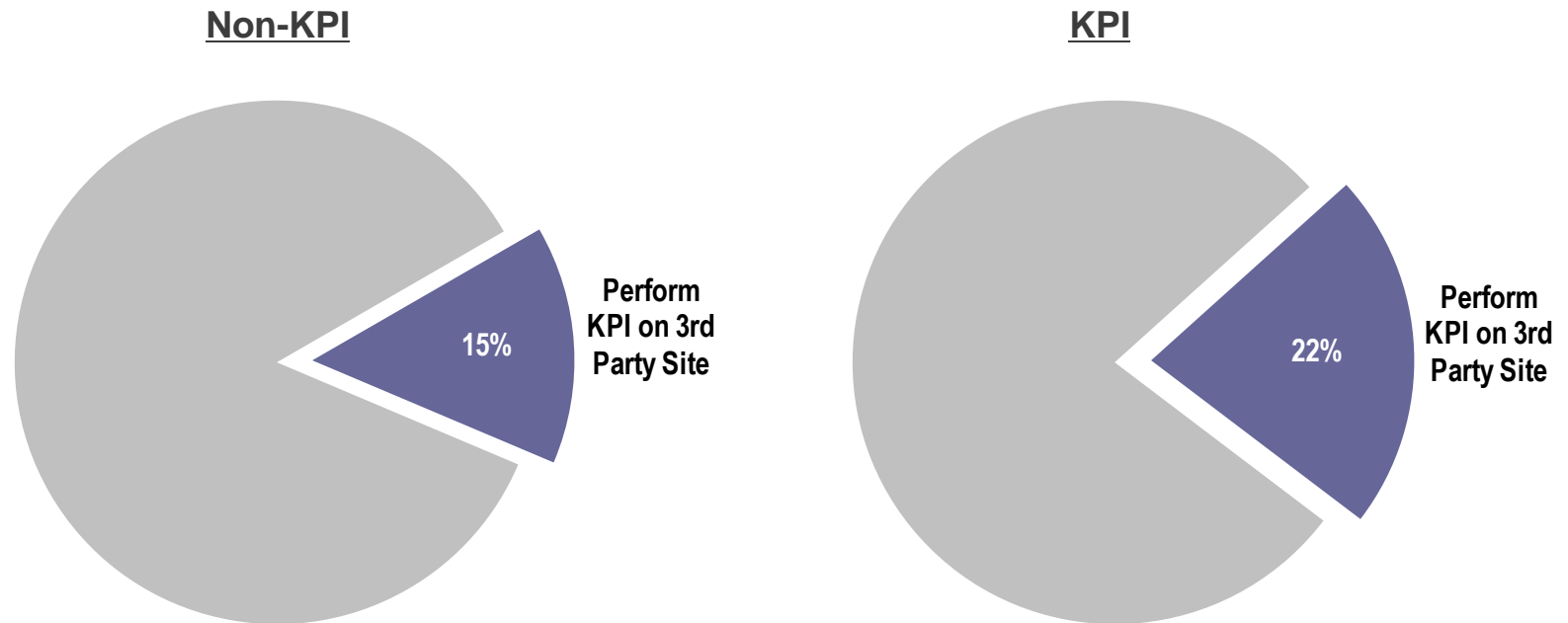


# 15% of consumers who visit OEM sites through search and do not perform KPI actually do so on 3<sup>rd</sup> party sites

Consumers who perform a KPI on OEM sites are also more likely to complete a KPI action on a 3<sup>rd</sup> party side compared to Non-KPI consumers

## Consumers from Search Who Conduct KPI on 3<sup>rd</sup> Party Site

(Clickstream data; % of Non-KPI Consumers, October-December 2008 Monthly Average)



# Key Takeaways

Non-KPI consumers are ...

- equal to 21% of search referring sessions to OEM websites
- in-market automotive shoppers with 43% in the vehicle purchase process
- looking for general information on OEM sites whereas KPI consumers are looking for specific information
- novices in their understanding and knowledge of the automotive industry and vehicles on the market
- less engaged, spend less time and visit fewer pages on other parts of OEM sites than KPI consumers
- considering fewer brands and visiting fewer sites in the automotive category, especially Tier 3 automotive sites (dealer sites)

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