



# Influencing the Millennial Car Decision Journey



Beth Rockwood

VP Portfolio Ad Sales Research

**TURNER**

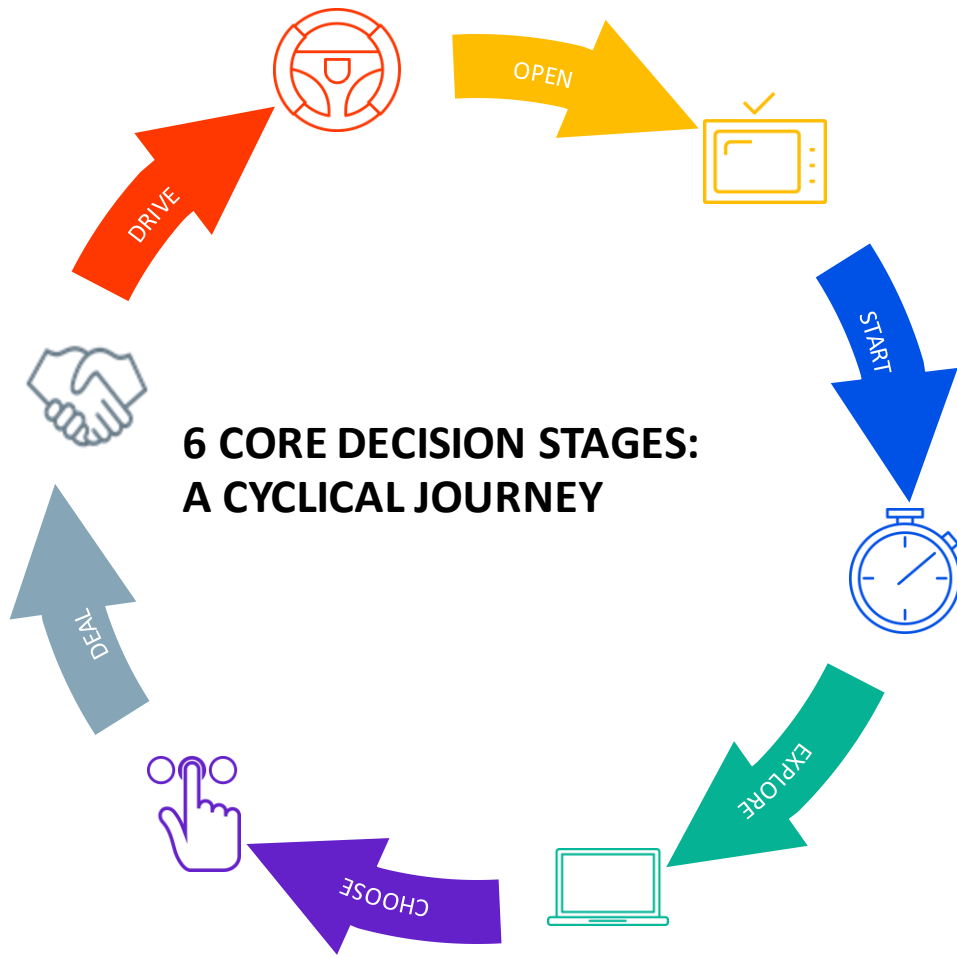
# A DETAILED AND ROBUST QUANTITATIVE METHODOLOGY



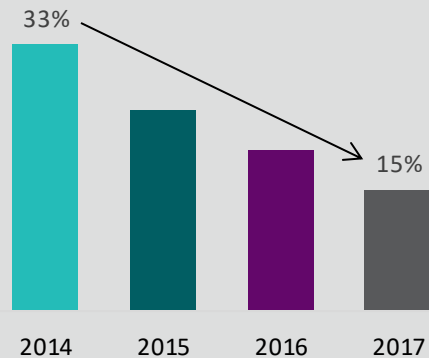
**AN INDUSTRY-LEADING APPROACH TO  
CONSUMER DECISION JOURNEY [CDJ]  
RESEARCH**



**A ROBUST ONLINE SAMPLE AND IN-  
DEPTH QUESTIONNAIRE**



% OF CONSUMERS PROCEEDING SEQUENTIALLY THROUGH EACH STAGE



68% skip directly to Explore/Choose



# 12 DISTINCT CONSUMER NEEDS

## **AWARENESS**

Hear about new makes, models or features for the first time

---

## **VISIBILITY**

See makes, models and relevant features up close

---

## **INSPIRATION**

Be inspired by car brands, new features or auto content

---

## **FAMILIARITY**

Be more familiar with makes, models, features or dealerships

---

## **BOND**

Feel a closer connection with a car brand or dealership

---

## **PERSONALIZATION**

Get information that's focused on my individual needs

---

## **COMPARE**

Get help comparing or choosing between different makes or options

---

## **CONFIRM**

Get reassured that I'm making the right choice

---

## **LOCATE**

Know where I can find the car I'm interested in

---

## **BUY**

Know where and how to get the best deal

---

## **ENJOY**

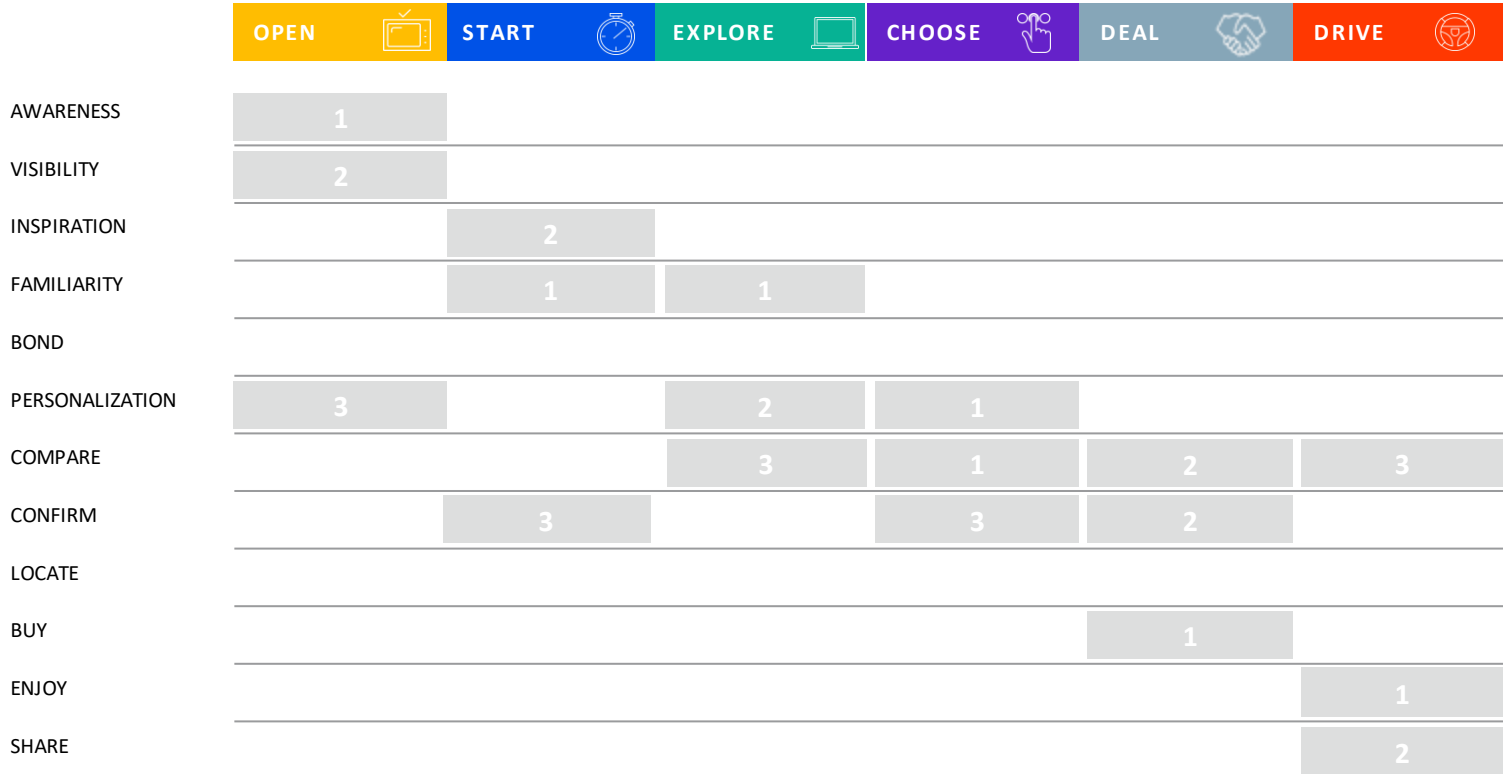
Understand how to make the most of the car and its features

---

## **SHARE**

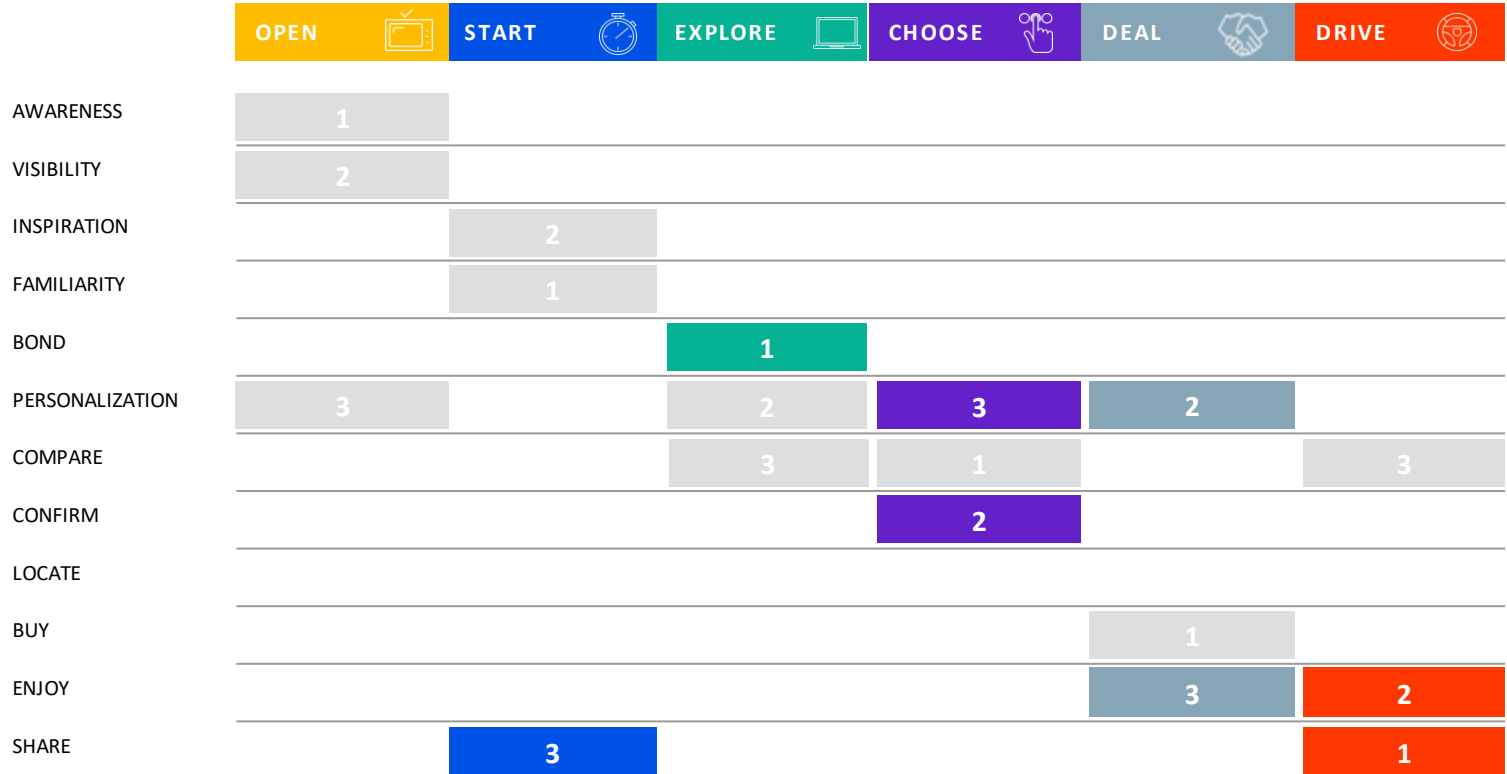
Share or discuss my thoughts and experiences with others

# TOP 3 NEEDS – TOTAL ADULTS



Source: Turner/Tapestry CDJ Auto 2017. Base = 18+.

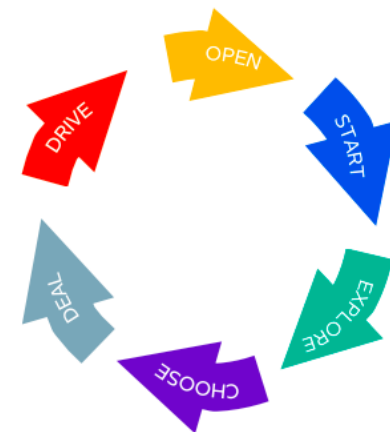
# TOP 3 NEEDS – P18-34



Source: Turner/Tapestry CDJ Auto 2017. Base = 18+.

# MILLENNIAL MALES WANT VISIBILITY, PERSONALIZATION, LOCATION AND SHARING EARLIER IN THE JOURNEY THAN MILLENNIAL FEMALES

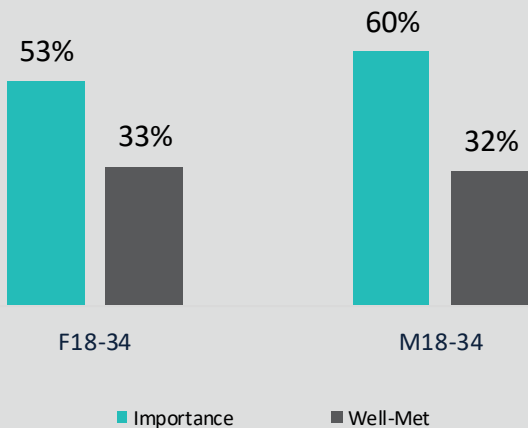
MOST IMPORTANT STAGE	♀	♂
AWARENESS	OPEN	OPEN
VISIBILITY	START	OPEN
INSPIRATION	START	START
FAMILIARITY	START	START
BOND	EXPLORE	EXPLORE
PERSONALIZATION	CHOOSE	EXPLORE
COMPARE	CHOOSE	CHOOSE
CONFIRM	START	START
LOCATE	START   CHOOSE	START   EXPLORE
BUY	START   DEAL	DEAL
ENJOY	DEAL	START
SHARE	START   DRIVE	START



# AWARE – MILLENNIAL MALES VS. FEMALES

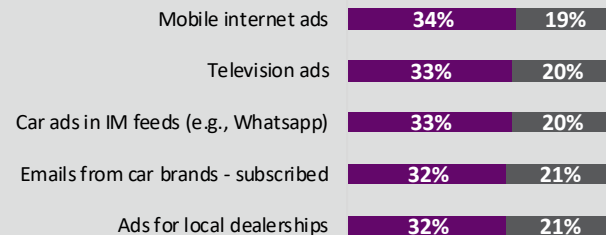
“Hear about new makes, models or features for the first time”

## IMPORTANCE OF NEED DURING PEAK STAGE VS. % MET BY CURRENT MEDIA

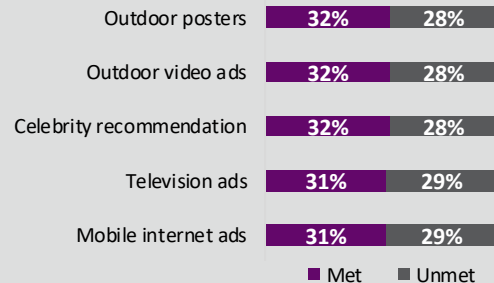


## TOP 5 CHANNELS THAT MEET NEED:

### FEMALES 18-34



### MALES 18-34

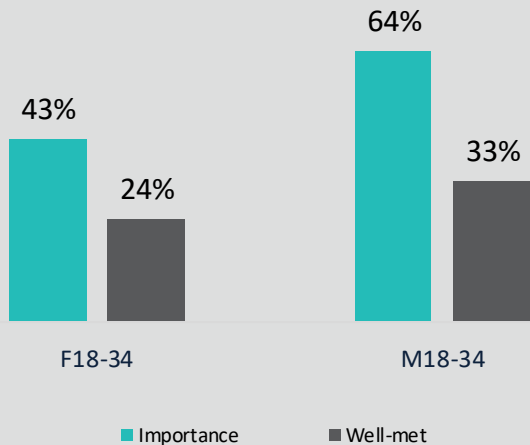




# VISIBLE – MILLENNIAL MALES VS. FEMALES

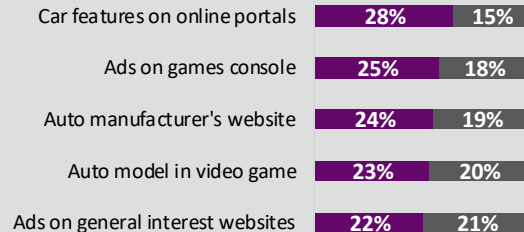
“See makes, models and relevant features up close”

## IMPORTANCE OF NEED DURING PEAK STAGE VS. % MET BY CURRENT MEDIA

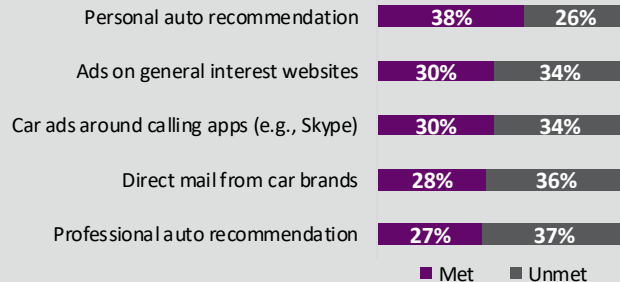


## TOP 5 CHANNELS THAT MEET NEED:

### FEMALES 18-34



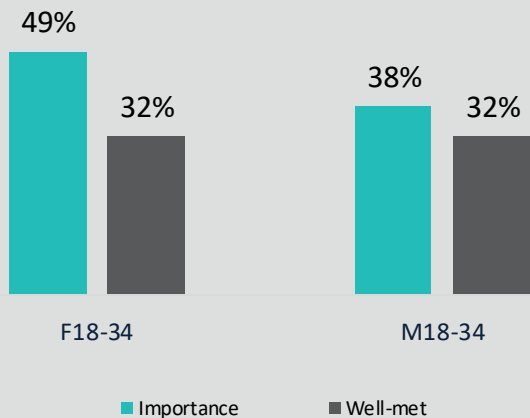
### MALES 18-34



# BOND – MILLENNIAL MALES VS. FEMALES

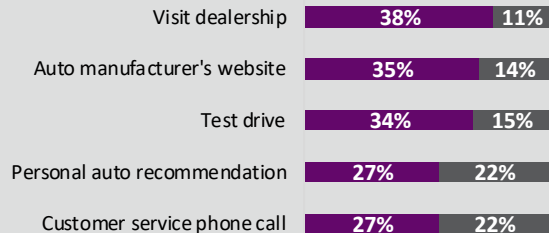
“Feel a closer connection with a car brand or dealership”

## IMPORTANCE OF NEED DURING PEAK STAGE VS. % MET BY CURRENT MEDIA

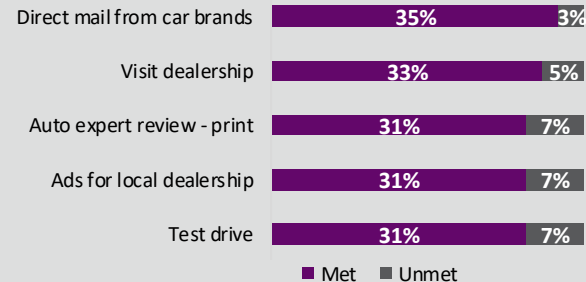


## TOP 5 CHANNELS THAT MEET NEED:

### FEMALES 18-34



### MALES 18-34

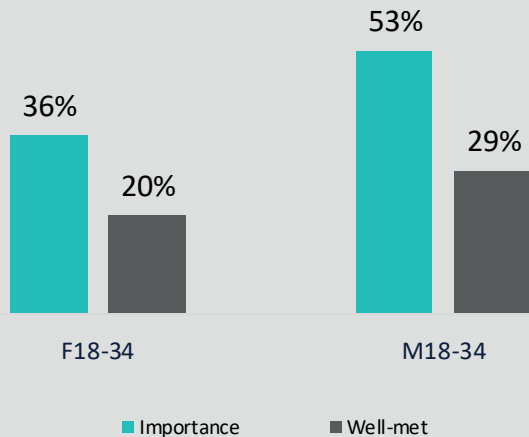




# SHARE – MILLENNIAL MALES VS. FEMALES

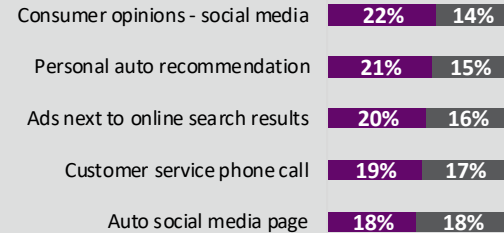
“Share or discuss my thoughts and experiences with others”

## IMPORTANCE OF NEED DURING PEAK STAGE VS. % MET BY CURRENT MEDIA

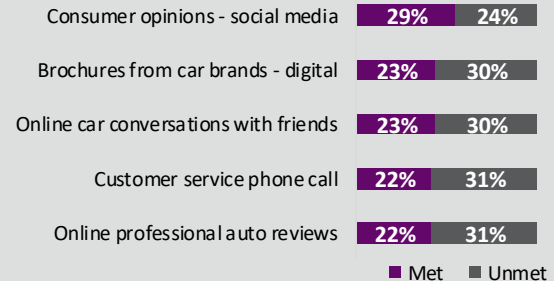


## TOP 5 CHANNELS THAT MEET NEED:

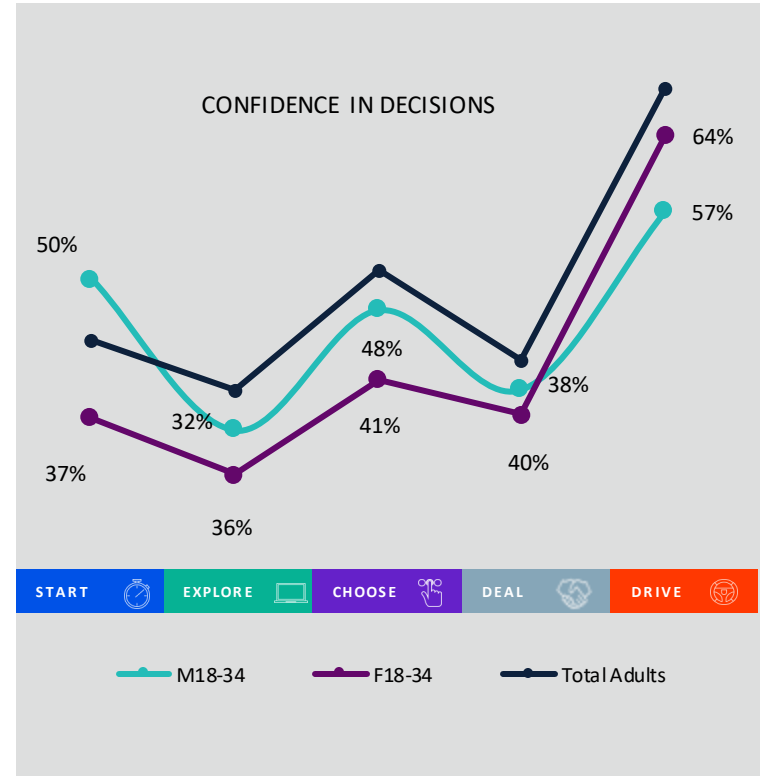
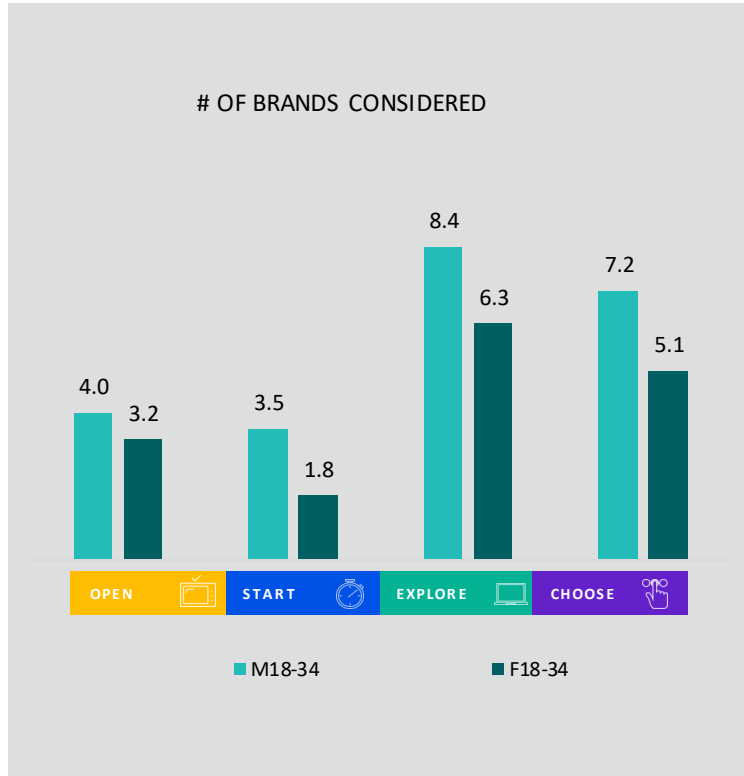
### FEMALES 18-34



### MALES 18-34

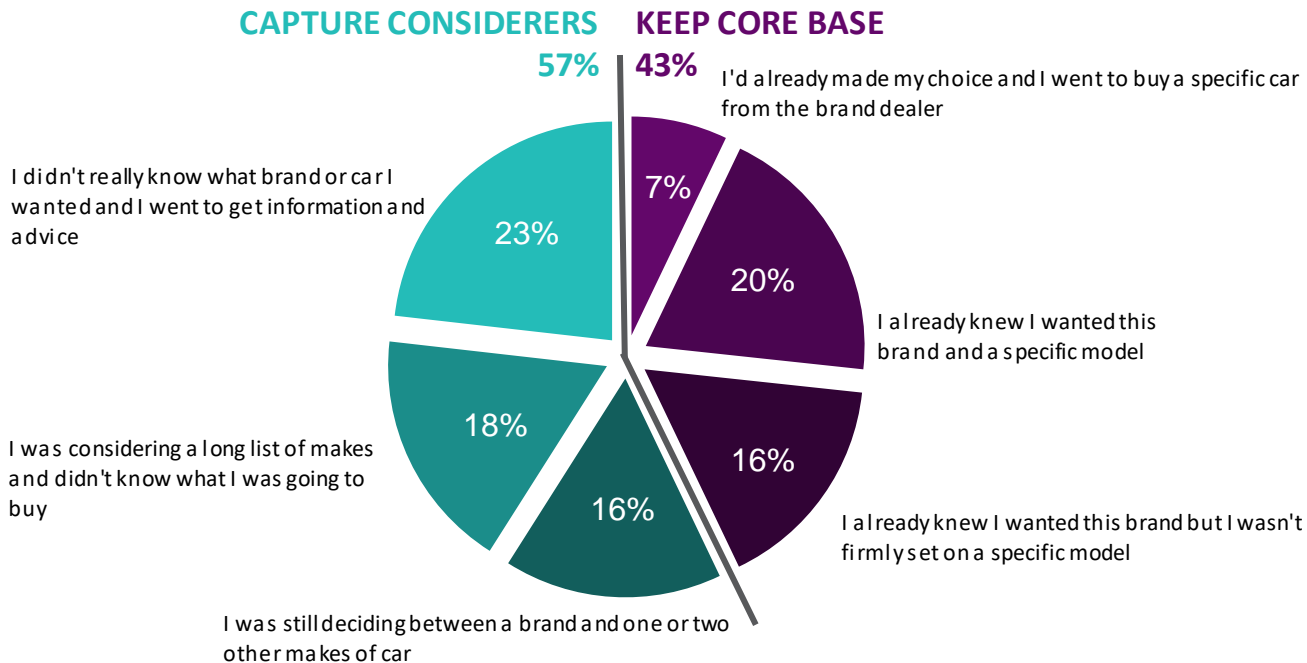


# MILLENNIALS CONSIDER MULTIPLE AUTO BRANDS, BUT LACK CONFIDENCE IN THEIR DECISIONS, PARTICULARLY DURING EXPLORE AND CHOOSE



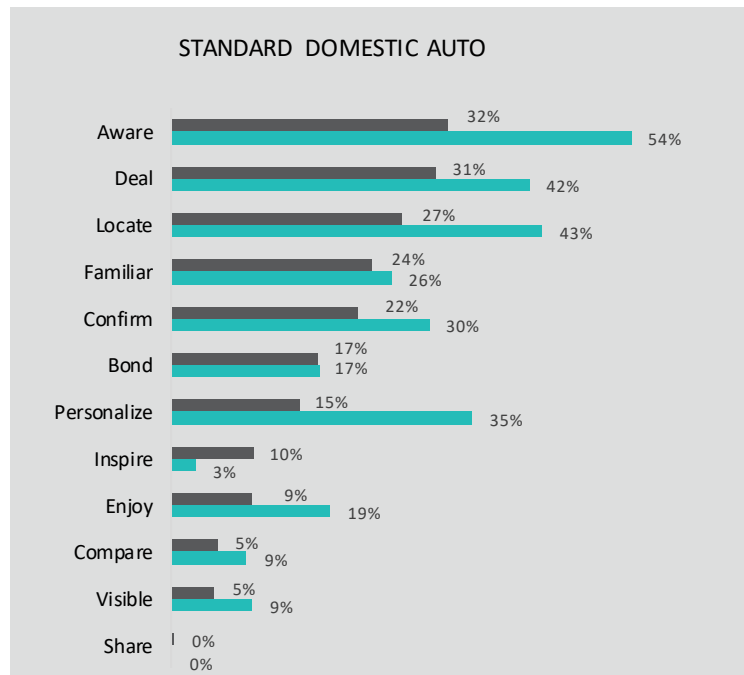
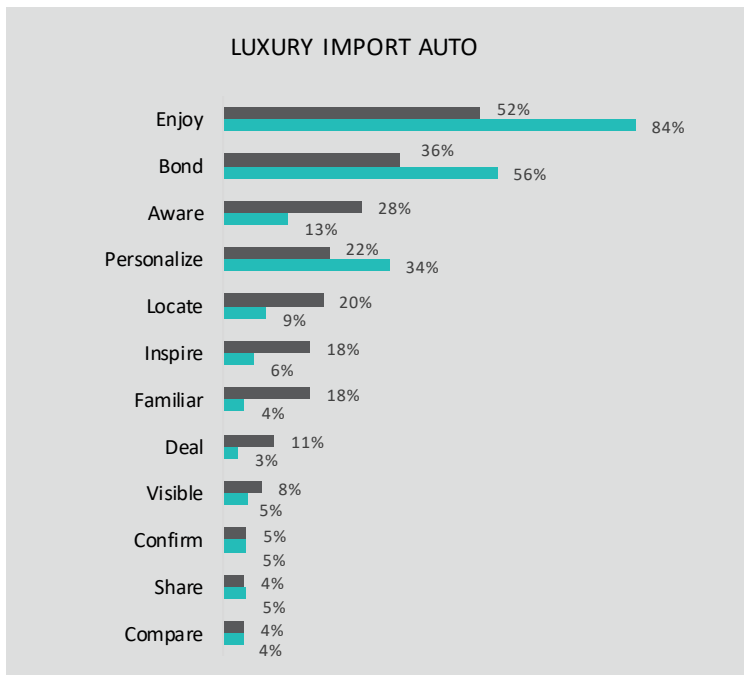
# PURCHASE PLANNING

(LUXURY IMPORT AUTO BRAND)



# NON-BUYER GAP ANALYSIS

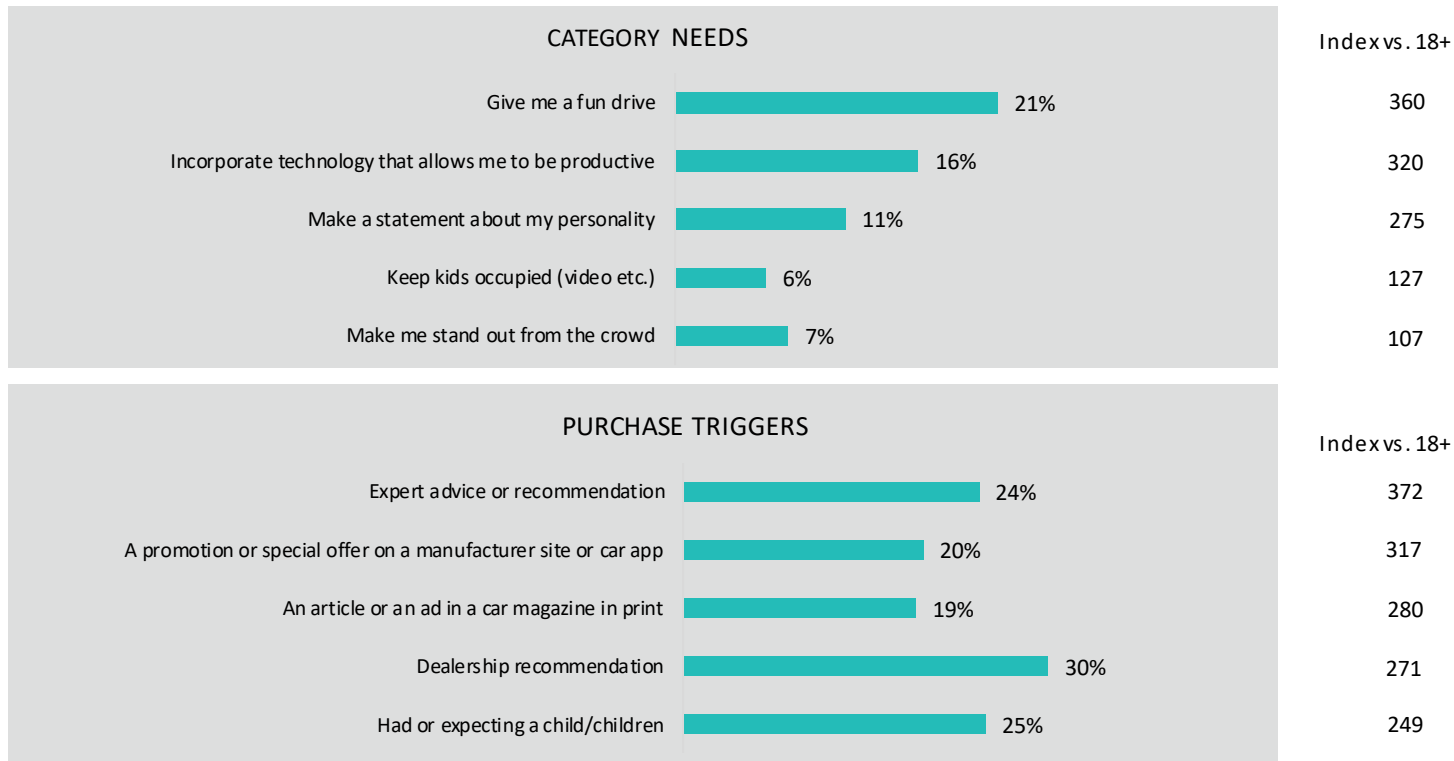
WHAT WOULD HAVE MADE YOU MORE LIKELY TO HAVE CHOSEN THIS BRAND THAT YOU DID NOT BUY?



■ Total ■ 18-34

Source: Turner/Tapestry CDJ Auto 2017. Base = Considered purchasing brand, but did not buy.

# UNDERSTANDING NEEDS AND TRIGGERS TO INFORM COMMUNICATIONS STRATEGY (LUXURY IMPORT AUTO BRAND)

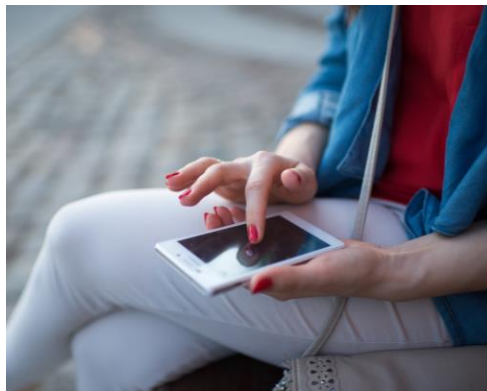




# IMPLICATIONS



Utilize ad tech to target auto intenders by CDJ Stage/Segment on linear TV and digital



Messaging should be optimized to address the unmet communications needs of consumers and ease anxiety over making purchase decisions



Social content/sharing platforms should be employed before and after purchase to empower brand advocacy/confirmation, particularly for male millennials