

# Clicks and Mortar

Nick King

Insight Director

Auto Trader



## Process & Methodology



**Auto Trader data analysis of all 13,000 UK retailers**



Comprehensive mystery shopping program



25% of retailers did not reply to the lead at all.

Only 25% invited the customer to the retailer



## Your enquiry

Contact Quality Part X Ltd Edmonton about this PORSCHE Cayman 987

Please select a reason for your enquiry.

I'd like to book a test drive

Is it still available?

I have a question

First name

e.g. John

Last name

e.g. Smith

Email

e.g. name@email.com

Phone Number (Optional)

e.g. 0777 000 000



I consent to my details being sent to the seller and their partners so that they



Only 28% had to wait for a sales exec

Only 18% had to wait more than 5 minutes

# 62%

introduced  
themselves by  
name...



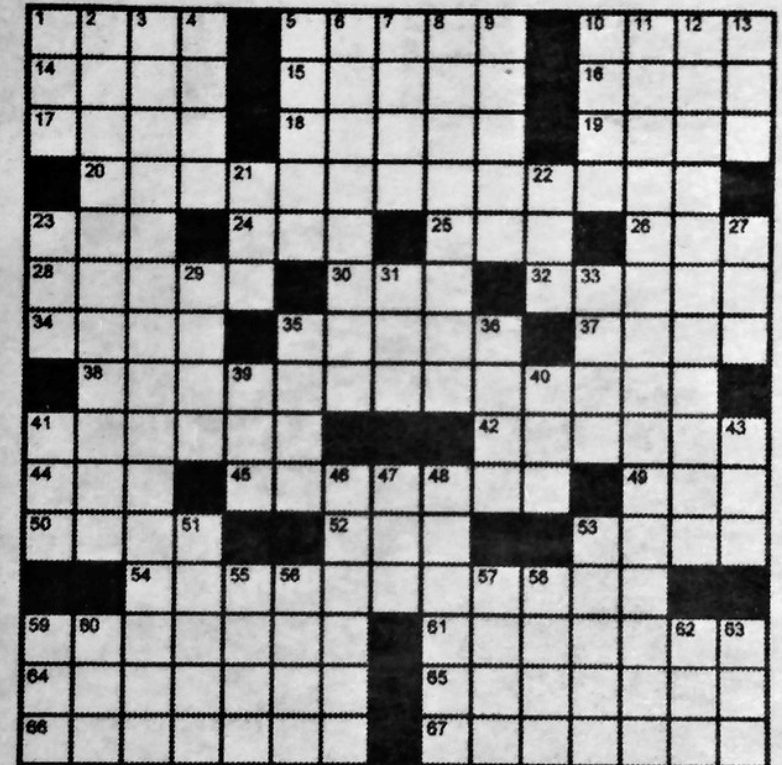
52%

took an email address...

15%

took no details!

## Existentialist Crossword Puzzle



No clues.

No correct answers.

No hope of ever solving puzzle.

Meaningless.

Just like life itself.

Jobs not journeys



Passive  
data

100 people  
buying soon



Skype depths

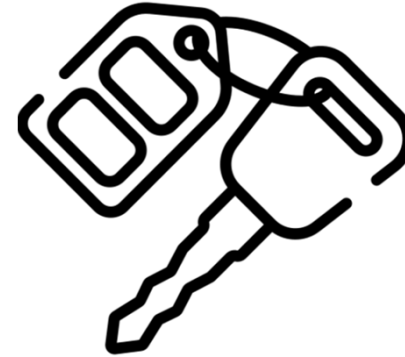
20 people  
actively  
looking



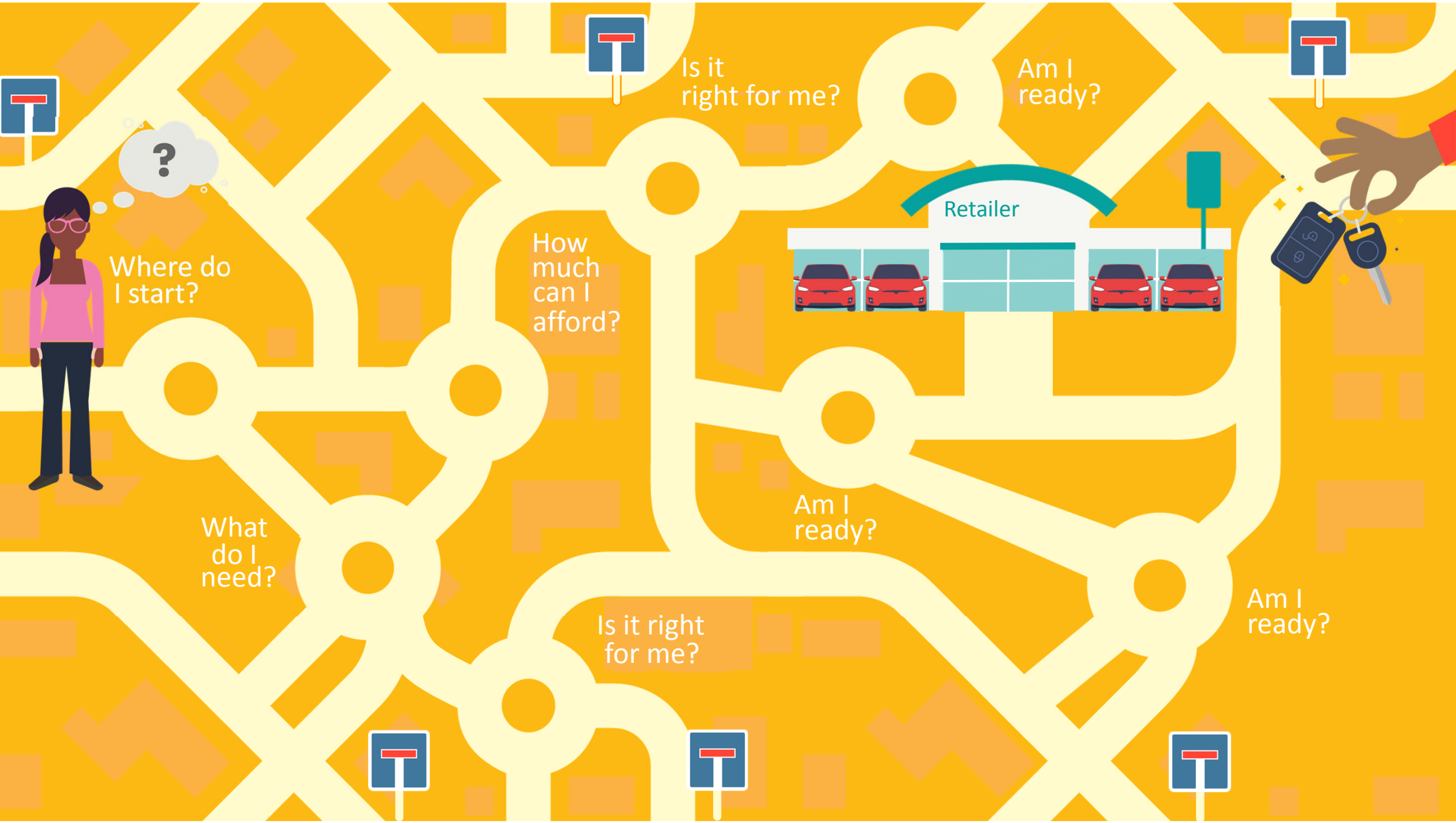
Quant survey

1,316 buying  
soon or bought  
recently





More than **one in three** would have bought a car sooner if they hadn't experienced any issues



?

Where do I start?

What do I need?

How much can I afford?

Is it right for me?

Am I ready?

Retailer

Am I ready?

Is it right for me?

Am I ready?

“People underestimate  
how hard it’s going to  
be...”

# 4 or 5

the number of jobs  
people think need to  
be done when buying a  
car

# 28

the actual number of  
jobs to be done  
when buying a car

## TO DO: Needs

### What do I need?

- Size of vehicle
- Brand
- Specification
- Trim level
- Car type
- Fuel type
- Warranty
- New or Used

## TO DO: Budget

### What can I afford?

- Monthly repayment
- Understanding Finance jargon
- Servicing costs
- Tax
- Insurance
- Fuel economy
- Purchase or lease
- Part-exchange value

## TO DO: Validating choices

### Is it right for me?

- Expert reviews
- Owner reviews
- Will it fit in garage?
- Is it easy to drive?
- Do I need add-ons
- Seek advice from friends/family, forums

## TO DO: Buy

### Am I ready?

- Find a trustworthy retailer (retailer reviews)
- Visit Retailer
- Test drive
- Negotiate deal
- Prepare for haggling?
- Check documentation/service history
- Understand warranty/Gap insurance



Hard to find inspiration



High cognitive load



Difficult to compare



Lack of transparency



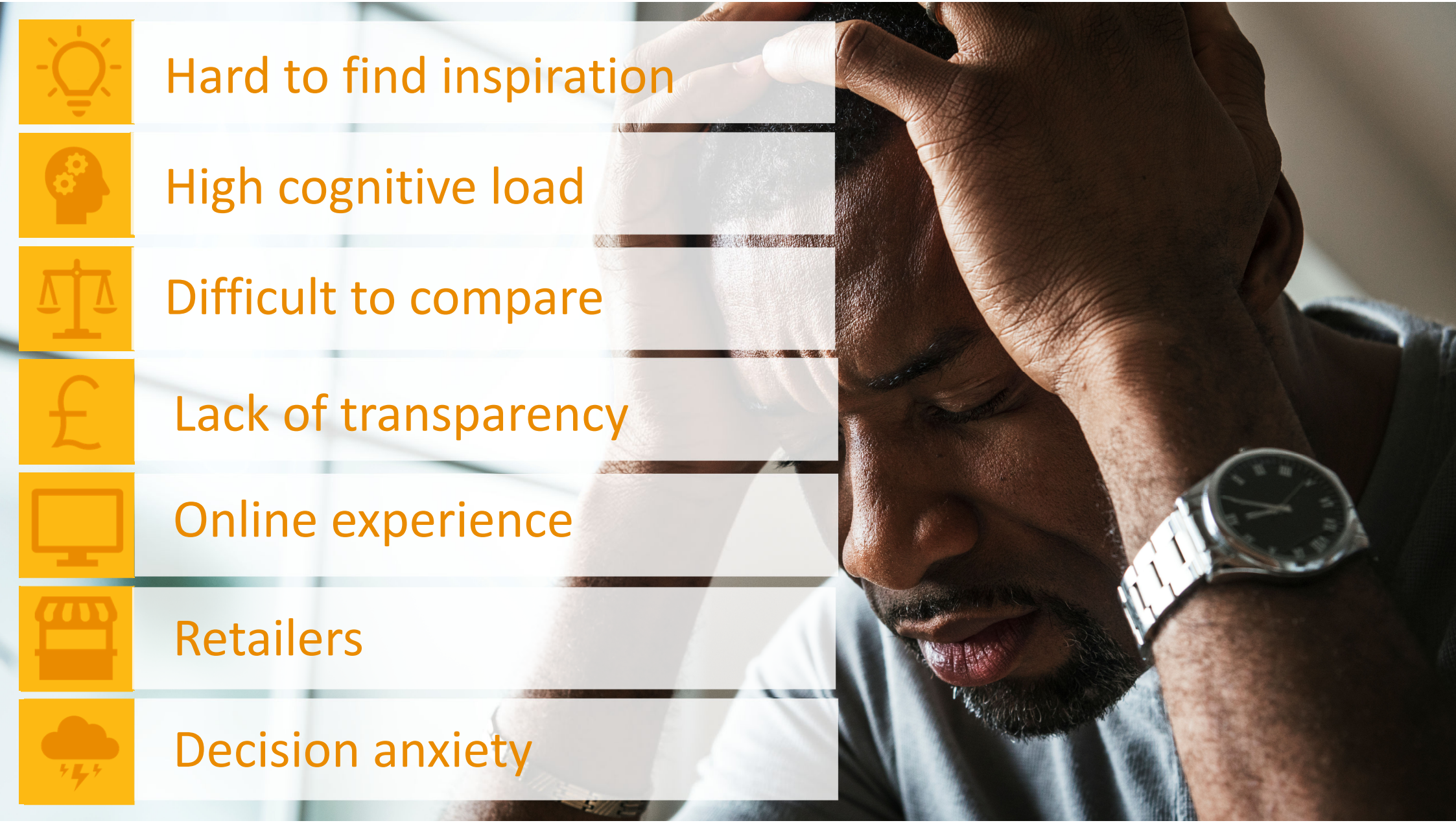
Online experience



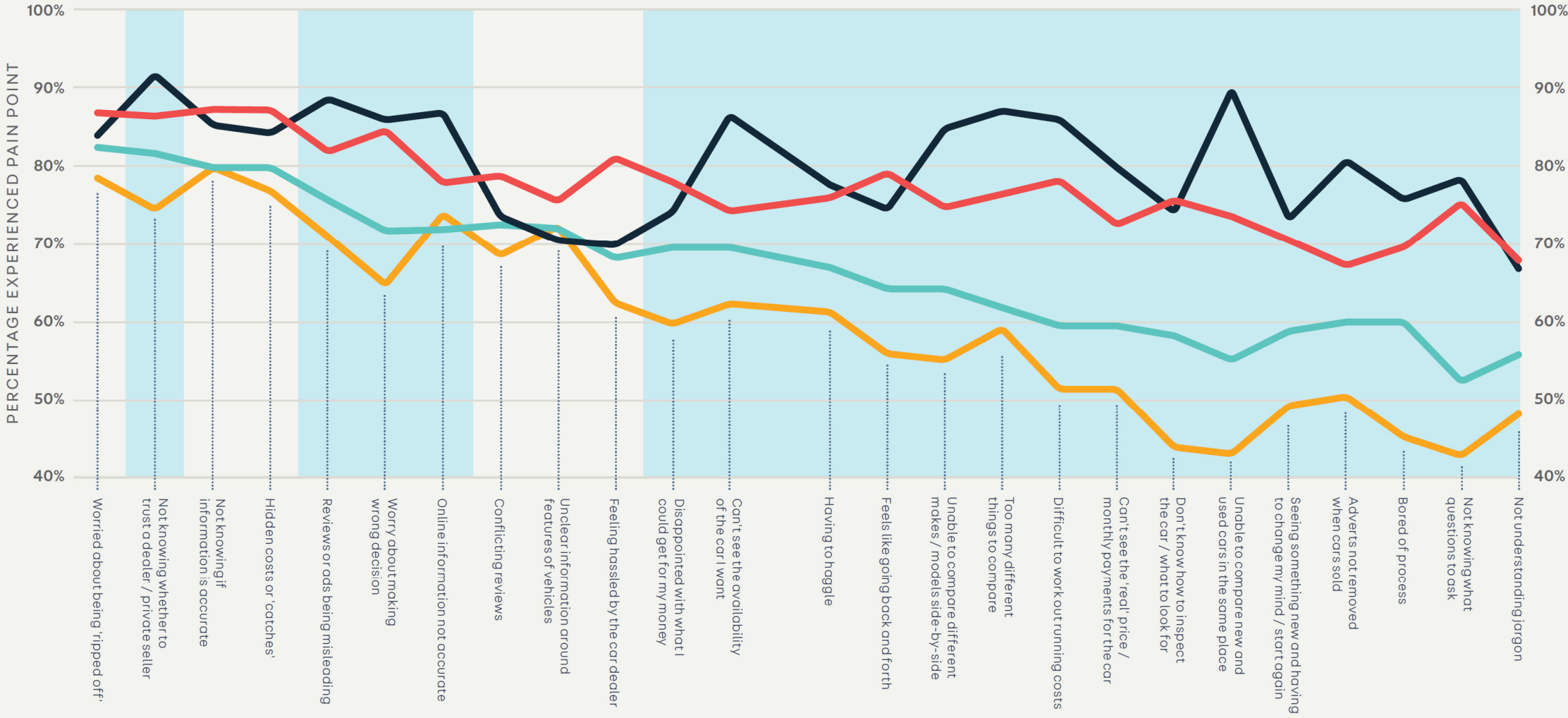
Retailers



Decision anxiety



Age range(years): 18-24 25-44 45-64 65+



Ease

Speed

Simplicity

Transparency

People are very open to influence

67%

new car considerers say  
'a few brands they'd buy  
from'

...33% don't care as long as car suits needs

Has car buying got more difficult or easier?

52%

think car buying hasn't changed

... 14% say it's got harder



deliveroo

UBER

So, what are the triggers?

46%

just felt like a  
change

14%

a change in lifestyle



More than half don't know  
where to start

### VEGETABLE SPECIALITIES

- 155 VEGETABLE JALFRAZI Cooked with green chilli, capsicum & onion £4.35
- 156 VEGETABLE MASSALA Cooked with almonds, herbs & cream £4.35
- 157 VEGETABLE KORAHAI A speciality of the Kofher Pass, vegetable cooked with spices, green herbs and peeled tomatoes £4.10

### VEGETABLES

- 158 ALOO GORI (Potatoes with cauliflower)
- 159 CHANA ALOO (Chick peas and potatoes)
- 160 BHINDI BHAJI (okra)
- 162 SAAG CREAM (spinach with cream)
- 163 SAAG BHAJI (spinach)
- 164 BOMBAY ALOO (medium potatoes)
- 166 CAULIFLOWER BHAJI (chick peas)
- 167 DRY VEGETABLES
- 168 BRINJAL BHAJI (aubergines)
- 169 DALL TARKA (lentils)
- 170 MILD VEGETABLE CURRY
- 171 MUSHROOM BHAJI
- 172 GARLIC MUSHROOM
- 173 MATTAR PANEER Green peas cooked with cottage cheese and herbs
- 174 SAG PANEER £2.80

### FRESHLY BAKED BREADS

- 175 NAN
- 176 GARLIC NAN (stuffed with garlic) £1.85
- 177 KULCHA NAN (with vegetable) £1.85
- 178 KEEMA NAN (with minced meat) £1.85
- 179 PESHWARI NAN Stuffed with nuts & raisins, comes sweet £1.85
- 180 CHILLI NAN £1.85
- 181 CHILLI & GARLIC NAN £1.85
- 182 CHEESE NAN £1.95
- 183 ROTI £1.95
- 184 PARATHA Buttered bread cooked on hot plate £1.95
- 185 STUFFED PARATHA Stuffed with vegetables £1.45
- 186 CHAPATY Thin bread cooked on a hot plate £1.70
- 187 PAPPADOM (thin or spicy) £1.85
- 188 RAITA (yogurt or spicy) £1.10
- 189 PICKLES & CHUTNEY (per portion) £0.50
- 190 RED CHUTNEY £1.20
- 191 CHIPS £0.50

### RICE

- 192 BOILED RICE (seasonal basmati rice) £1.50
- 193 PULAO RICE (basmati rice) £1.85
- 194 GARLIC RICE £2.45
- 195 MOTI PULAO RICE Cooked with minced meat and egg £2.55
- 196 SPECIAL FRIED RICE Egg and peas £2.45
- 197 KASHMIRI RICE (with fruits) £2.45
- 198 LEMON RICE £2.45
- 199 MUSHROOM RICE £2.45
- 200 KEEMA RICE £2.45
- 201 PEAS RICE £2.45
- 202 EGG FRIED RICE £2.45
- 203 COCONUT RICE £2.45

### SET MEALS

#### MEAL FOR 1 - £10.95

- Starters: Onion Bhaji
- Main Course: Chicken Tikka Massala, Bombay Potato, Nan Bread, Pulao Rice, Pappadom, Onion Salad

#### MEAL FOR 2 - £19.50

- Starters: Chicken Tikka, Onion Bhaji
- Main Course: Lamb Bhuna, Chicken Tikka Massala, Mixed Vegetable Curry, Mushroom Rice, Nan Bread, Pappadom, Onion Salad & Chutney

#### PICK N' MIX - £10.95

- ANY STARTER or SIDE DISH
- ANY MAIN DISH
- ANY RICE, ANY NAN BREAD
- WITH PAPPADUM, MINT SAUCE AND ONION SALAD (King Prawn Dish extra £2.50) (Excludes Tandoori Mixed Grill and Balti)

No discount on Set Meals

We do not accept Cheque. Minimum card payment is £8.00



### TASTY INDIAN NOODLES

- 204 CHEF'S SPECIAL NOODLE Cooked with chicken, lamb, prawn and mushroom £5.50
- 205 CHICKEN NOODLE £4.95
- 206 LAMB NOODLE £5.10
- 207 PRAWN NOODLE £5.20
- 208 KING PRAWN NOODLE £7.95
- 209 VEGETABLE NOODLE £4.95
- 210 MUSHROOM NOODLE
- 211 EGG NOODLE

### SOFT DRINKS

- 212 COKE (1.5 lit)
- 213 DIET COKE (2.5 lit)
- 214 LEMONADE (1.5 lit)
- 215 COKE / DIET COKE (3.0 lit)
- 216 TANGO / DIET TANGO (3.0 lit)

### DESSERTS & ICE CREAM

- 217 KULFI Indian Ice Cream, Pistachio, Almond
- 218 MANGO DELIGHT Exotic mango sorbet filled into a real half mango skin
- 219 COCONUT PARADISE Real half coconut shell filled with delicious cream
- 220 PINEAPPLE HEAVEN Natural pineapple skin filled with deliciously cool pineapple
- 221 MOKTA KULFI An exclusive cream pie filled with luxurious saffron and pistachio flavoured ice cream topped with nuts



### MADRAS (fairly hot)

- Chicken Madras £4.70
- Lamb Madras £5.00
- Keema Madras £4.60
- Keema (Minced Meat) £4.60
- Chicken or Lamb Tikka Special

### FREE HOME DELIVERY

With orders over £20.00

### APPETISERS

- Popadum £0.50
- Spicy Popadum £0.60
- Chutney £0.60
- (Mango / Onion / Lime Pickle / Chilli Pickle or Mint sauce)
- Chutney Tray (Mango, Onion and Mint Sauce) £1.50

### STARTERS

- Tandoori Chicken £2.75
- Tikka (Chicken or Lamb) £2.95
- Sheek Kebab £2.75
- Mix Kebab £3.50
- Onion Bhaji £2.75
- Chana Puri £2.50
- Prawn Puri £2.95
- King Prawn Puri £3.95
- Chicken Chat £2.95
- Aloo Chat £3.95
- King Prawn Butterfy £2.95
- Chicken Butterfy £1.95
- Meat Somosa £1.95
- Vegetable Somosa £3.50
- Chicken Pakora £3.50

### TANDOORI SPECIALITIES

- Tandoori Mixed Grill £7.95
- Chicken Tikka £6.95
- Lamb Tikka £7.50
- Tandoori Chicken £5.95
- Tandoori King Prawn £10.95
- Shashlick £7.50
- Sheek Kebab £5.50

### CHEF'S SPECIALITIES

- Red Chilli Special £8.50
- Shashlick Bhuna (Chicken or Lamb) £7.95
- Chicken Lankhani £6.50
- Tikka Jalfrezi (Chicken or Lamb) £6.95
- Manchurian Chicken £6.95
- Chicken Tikka Pasanda £6.95
- Garlic Chilli Chicken £6.95
- Bengal Style Curry £6.50
- Chicken Tikka Massala £6.50
- Butter Chicken £6.95
- Peshwari Chicken or Lamb £6.50
- Chicken or Lamb with special sauce £6.50
- Chicken or Beef Achar £6.50
- Saagwala (Chicken Tikka or Lamb) £6.50
- Chicken Bombay £6.50
- Chicken Saag Paneer £7.50

### BIRYANI DISHES

- Red Chilli Special Biryani £7.95
- Chicken Tikka Biryani £6.95
- Lamb or Lamb Tikka Biryani £7.50
- Chicken or Beef Biryani £6.95
- Prawn Biryani £6.95
- King Prawn Biryani £6.95
- Vegetable Biryani £6.95
- Chicken & Mushroom Biryani £6.95

### TRADITIONAL DISHES

- Madras £5.50
- Vindaloo £5.95
- Bhuna £6.95
- Korma £5.95
- Chicken or Beef £6.95
- Chicken Tikka £6.95
- Lamb or Lamb Tikka £5.95
- Prawn £6.95
- Rogan Josh £4.95
- Dansak £8.95
- Pathia £6.95
- Duplaza £6.95
- Mixed Vegetables £6.95
- King Prawn £6.95
- Special Mixed Tikka £6.95
- Red Chilli Special £6.95

### BALTI DISHES

- Red Chilli Special Balti £6.50
- Balti Saag Chicken £6.50
- Chicken Tikka £6.95
- Lamb or Lamb Tikka £5.95
- Chicken or Beef Balti £6.50
- Prawn Balti £6.50
- King Prawn Balti £5.50
- Vegetable Balti £6.50
- Chicken & Mushroom £6.50
- Garlic Chilli Chicken £6.95

### KORAI DISHES

- Red Chilli Special £6.50
- Chicken, Beef, Prawn and Mushroom £6.95
- Chicken Tikka £6.95
- Lamb Tikka £5.95
- Chicken or Beef £6.50
- Prawn £6.50
- King Prawn £5.50
- Vegetable £6.50
- Chicken & Mushroom £6.50
- Garlic Chilli Chicken £6.95

### JALFRAZI DISHES

- Red Chilli Special £7.50
- Chicken, Beef, Prawn and Mushroom £6.50
- Chicken Tikka £6.95
- Lamb Tikka £5.95
- Chicken or Beef £6.50
- Prawn £6.50
- King Prawn £5.50
- Vegetable £6.50
- Chicken & Mushroom £6.50
- Garlic Chilli Chicken £6.95

### ENGLISH DISHES

- Fried Chicken & Chips £5.50
- Chicken Omelette & Chips £5.50
- Chicken & Mushroom Omelette & Chips £5.50
- Prawn Omelette & Chips £5.50
- Cucumber/Onion Raita £1.50
- Mango Chutney £0.40
- Onion Chutney £0.40
- Lime Pickle £0.50
- Yoghurt Sauce £0.50
- Spiced Papadum £0.50
- Side Salad £1.00
- Garlic Papadum £0.50
- Papadum £0.40

### EXTRAS

- Curry Sauce £1.80
- Rogan Josh £2.20
- Bhuna Sauce £2.20
- Madras/Vindaloo Sauce £2.20
- Tandoori/Masala Sauce £2.50
- All Other Sauces £2.50

- 12. Butter Chicken Delight 12.50
- 13. Tandoori Chicken Delight 12.50
- 14. Beef Delight 12.50
- 15. Lamb Delight 12.50
- 16. Fish Delight 12.50
- 17. Shrimp Delight 12.50

- 29. Samosa Chutai Chikpea curry, two veg, yogurt, tamarind sauce

100 MARTINS ROAD, SHORTLANDS, BROMLEY, KENT BR2 0EF

# The Anchor car

 **86%**

have a car in mind  
that they're  
comparing against

**91%**

if considering only  
new cars

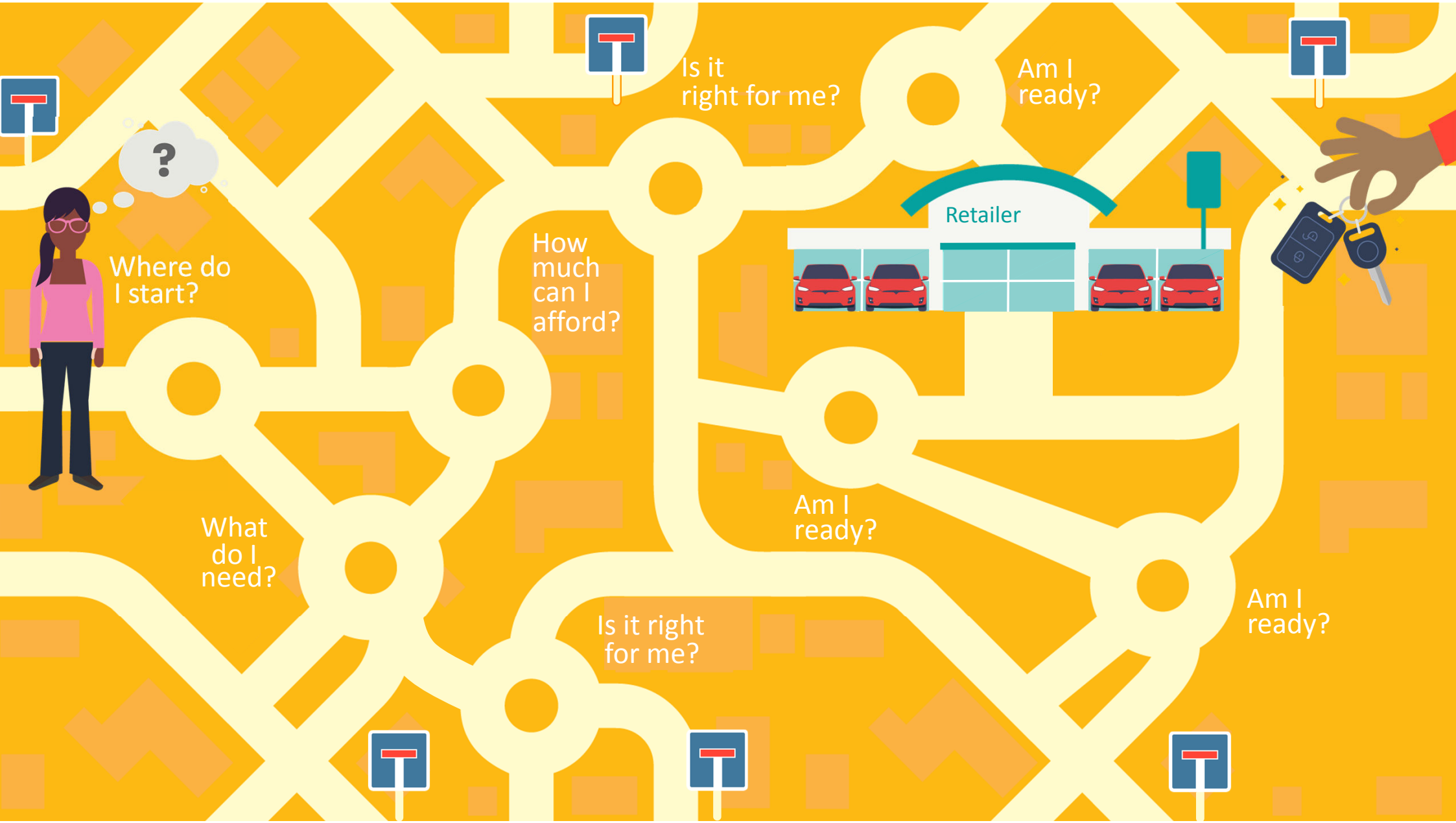


	Total	New considerers
My current car	42%	46%
A car I've seen out and about	32%	34%
A car I've had in the past	20%	20%
A car I've seen a review of (written, online, on TV show)	18%	19%
A friend / family member's car	16%	14%
A car I've seen an advert for	14%	17%
A car I've hired previously	5%	4%

# Can we use the tech to find the anchor and inspire?

The screenshot shows the AutoTrader homepage. At the top, there are navigation links: 'Buying new & used', 'Sell your car', 'Car reviews & more', and 'Finance, insurance & more'. Below this is a grid of car listings with their RRP, current price, and savings. A prominent red box highlights the 'Sell your car easily' section, which includes the text 'Every 60 seconds someone chooses to sell on Auto Trader' and a form with 'Registration' (oy66 gue) and 'Mileage' (14000) fields, and a 'Sell your car' button. Below this is a 'Car buying essentials' section with four cards: 'What's it worth?', 'Car insurance', 'Car finance & loans', and 'Check a car's history', each with a 'Get a quote' or 'Start check' button.

The screenshot shows the 'Sell your car' form on AutoTrader. At the top right is a 'Help & FAQs' button. The form is divided into three steps: '1 Vehicle details', '2 Your advert', and '3 Package & Payment'. Step 1 is active, showing 'Enter the basic details about the car you want to sell'. The registration 'OY66GUE' and mileage '14000' are entered. A 'Find details' button is visible. Below this, a red box highlights the search results for 'Ford Fiesta', showing 'Hatchback (2012 - 2017) MK7 Facelift 1.0 T EcoBoost ST-Line (s/s) 3dr'. It also states 'Over the last 30 days, Ford Fiesta adverts on Auto Trader have been viewed 3.7 million times.' and provides a table of specifications: Fuel type (Petrol), Engine size (999cc), Body type (Hatchback), Colour (Grey), Transmission (Manual), Date of first registration (14/09/2016), and Tax (Band B (£20)). At the bottom, there are 'Back' and 'Next step' buttons.



Where do I start?

What do I need?

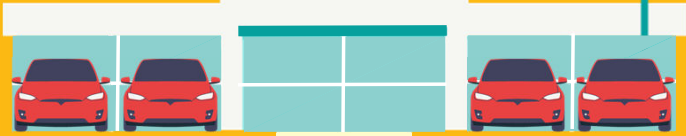
How much can I afford?

Is it right for me?

Am I ready?

Am I ready?

Retailer



Am I ready?

Is it right for me?





Where do I start?

How much can I afford?

## TO DO: Budget

### What can I afford?

- Monthly repayment
- Understanding Finance jargon
- Servicing costs
- Tax
- Insurance
- Fuel economy
- Purchase or lease
- Part-exchange value



What do I need?

Is it for

Am I ready?

Am I ready?

Over 80% of people are worried about hidden costs or 'catches'



# 80%

find it difficult to work out  
the running costs



Ease

Price transparency

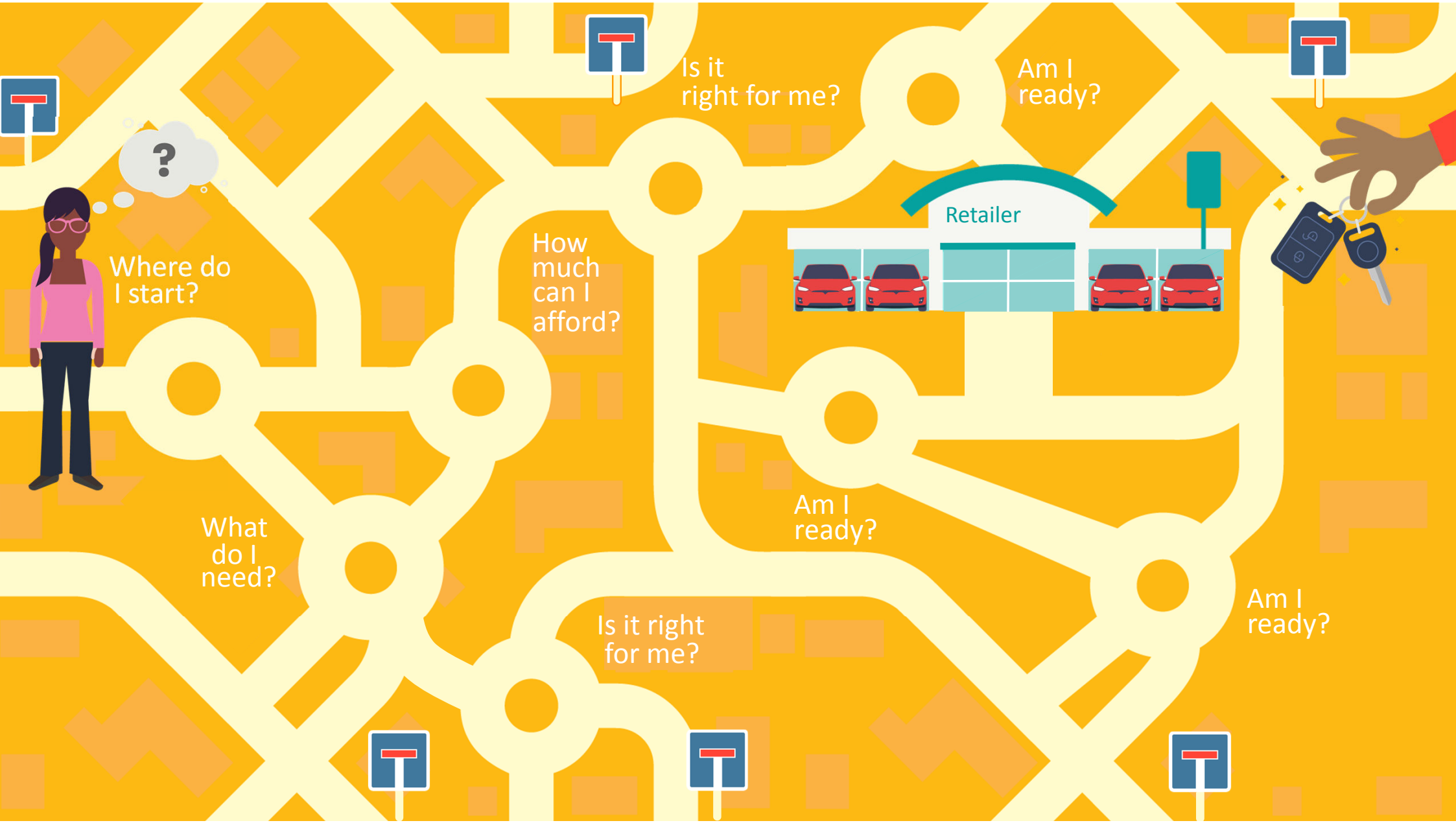
Speed

Understanding full  
ownership costs

Simplicity

Prepare them for the  
retailer conversation

Transparency



Where do I start?

What do I need?

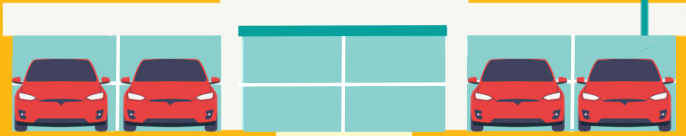
How much can I afford?

Is it right for me?

Am I ready?

Am I ready?

Retailer



Am I ready?

Is it right for me?



## TO DO: Needs

### What do I need?

- Size of vehicle
- Brand
- Specification
- Trim level
- Car type
- Fuel type
- Warranty
- New or Used

Where do I start?

Is it right for me?

Am I ready?

Retailer

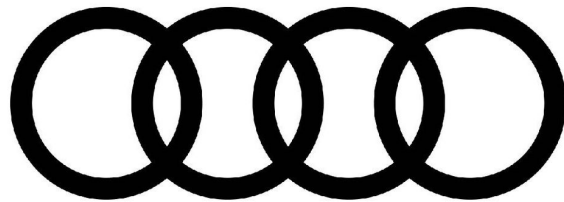
What do I need?

Am I ready?

Am I ready?

65%  
think the  
choice is too  
complex





# 3 models – 12 versions

Cars [^](#) Buy [v](#) Own [v](#) Discover Volvo [v](#)



Support

Build

Used

Offers

Retailers



All

SUV/ Crossover

Estate/ Hatchback

Saloon



we share.

[Learn more >](#)

[Offers >](#)

[Business & Fleet >](#)

[Owner Reviews >](#)

[Our model lineup >](#)

[Used Cars >](#)

[Accessories >](#)

SUV/  
Crossover

**XC90**



Starting from £53,085

[Build >](#) [Explore >](#)

**XC60**



Starting From £37,785

[Build >](#) [Explore >](#)

**XC40**



Starting From £28,965

[Build >](#) [Explore >](#)

# 10 models – 20 versions



**Mercedes-Maybach S-Class**

OTR price starting from £179,245.00



**New CLA Shooting Brake**

OTR price starting from £31,550.00



**C-Class Estate**

OTR price starting from £34,825.00



**E-Class Estate**

OTR price starting from £40,070.00



**GLA**

OTR price starting from £25,500.00



**New GLC**

OTR price starting from £39,500.00



**GLC**

OTR price starting from £37,365.00



**New GLC Coupé**

OTR price starting from £44,125.00



**GLC Coupé**

OTR price starting from £41,020.00



**New GLE**

OTR price starting from £55,710.00



**GLE**

OTR price starting from £65,380.00



**GLE Coupé**

OTR price starting from £65,165.00



**New GLS**

OTR price starting from £73,540.00



**G-Class**

OTR price starting from £143,370.00

## Coupés



**New CLA Coupé**

OTR price starting from £30,550.00



**C-Class Coupé**

OTR price starting from £35,290.00



**E-Class Coupé**

OTR price starting from £41,465.00

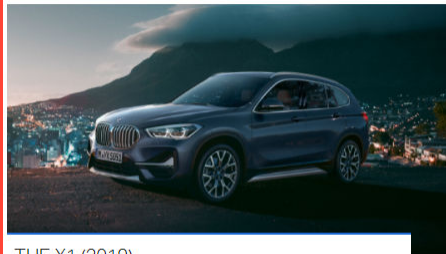


**CLS Coupé**

OTR price starting from £50,215.00

# 8 models - 27 versions

Select a BMW X model.



THE X1 (2019).

Be prepared for whatever the day brings with THE X1 SAV, which features a versatile interior space, enhanced connectivity and supreme handling.

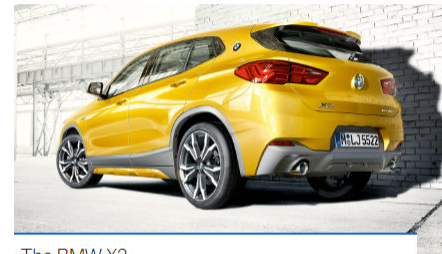
[Explore THE X1](#)



The BMW X1 (2018).

The BMW X1 turns the everyday into an adventure. Its SAV proportions deliver incredible versatility, while its spacious interior gives enormous flexibility.

[Explore the X1](#)



The BMW X2.

Dare to be different with the BMW X2. Featuring bold aesthetics and the latest technology, it's perfect for those wanting to break free from the daily routine.

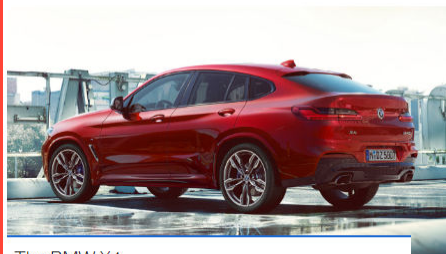
[Explore the X2](#)



The BMW X3.

A tough competitor in the SAV class, the BMW X3 sets standards for versatility, adventure and driving passion. And in doing so, raises driving pleasure to new levels.

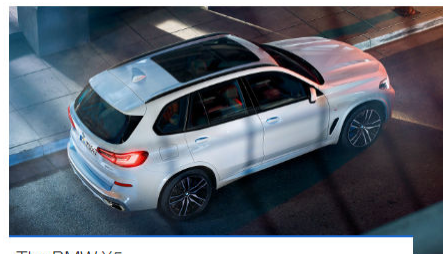
[Explore the X3](#)



The BMW X4.

The BMW X4's supreme xDrive handling and athletic appearance is elevated by its exceptional performance – and is ready to conquer the road.

[Explore the X4](#)



The BMW X5.

Discover the completely reimagined BMW X5, which delivers impressive levels of power, technology and style.

[Explore the X5](#)



The BMW X6.

Combining the presence of an X model, the sportiness of a coupé and the power of BMW TwinPower Turbo Engines, the BMW X6 breaks the norm.

[Explore the X6](#)



The new BMW X7.

Elevate your adventures with exquisite levels of refinement and presence, thanks to the new BMW X7. Discover luxury without limits.

[Explore the X7](#)

5 models – 11 Versions – Q2 has 20 trim & engine combinations alone!



A6 Range (4)



A7 Range (2)



A8 Range (2)



Q2 Range (3)



Q3 Range (2)



Q5 Range (3)



Q7 Range (1)



Q8 Range (2)



No longer a choice of 4 but now over  
100 models

Select a BMW X model.



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[Explore the X2](#)



**The BMW X3.**



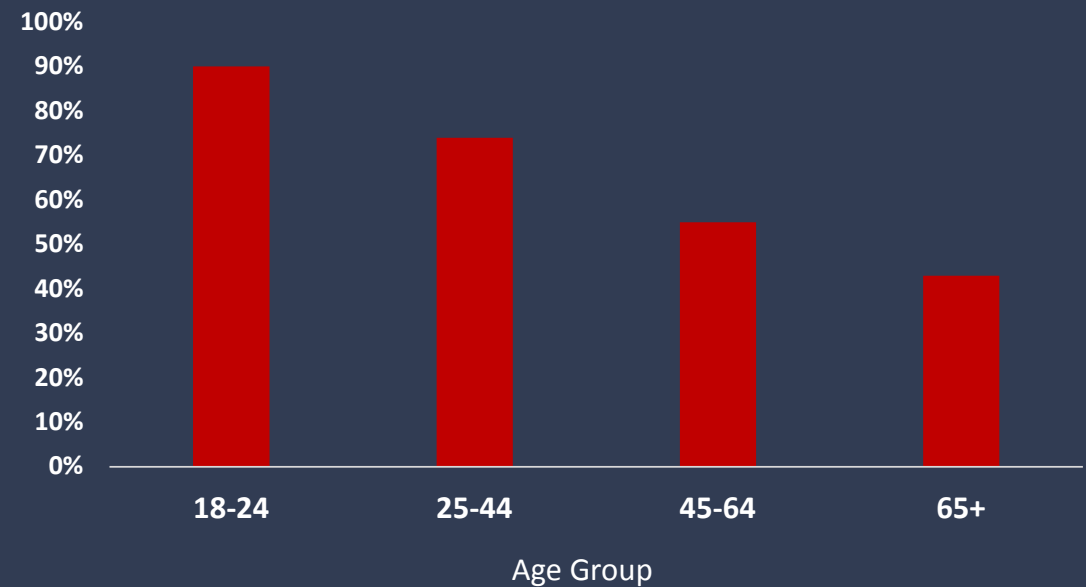
**The BMW X4.**



**The BMW X5.**

Buyers want to compare **new and used** cars in the same place

% Experienced pain as unable to compare new and used in the same place



Comparisons aren't done in an intense & focussed period of time, buyers are "snacking".



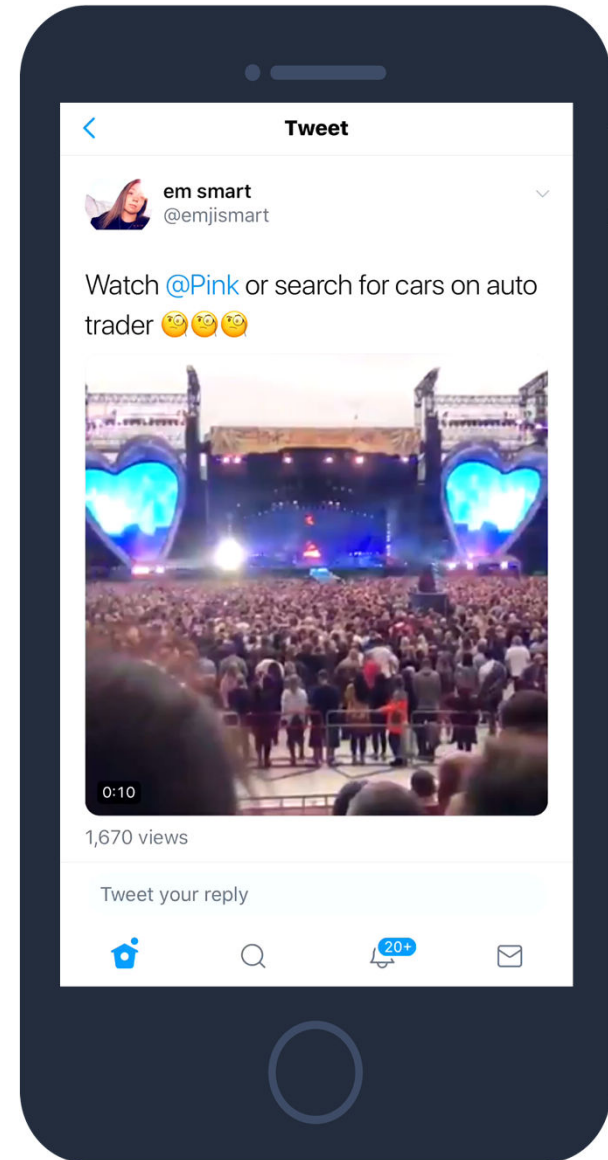
Any **Time**



Any **Where**



Any **Device**



So what should we do about it?

Ease

Speed

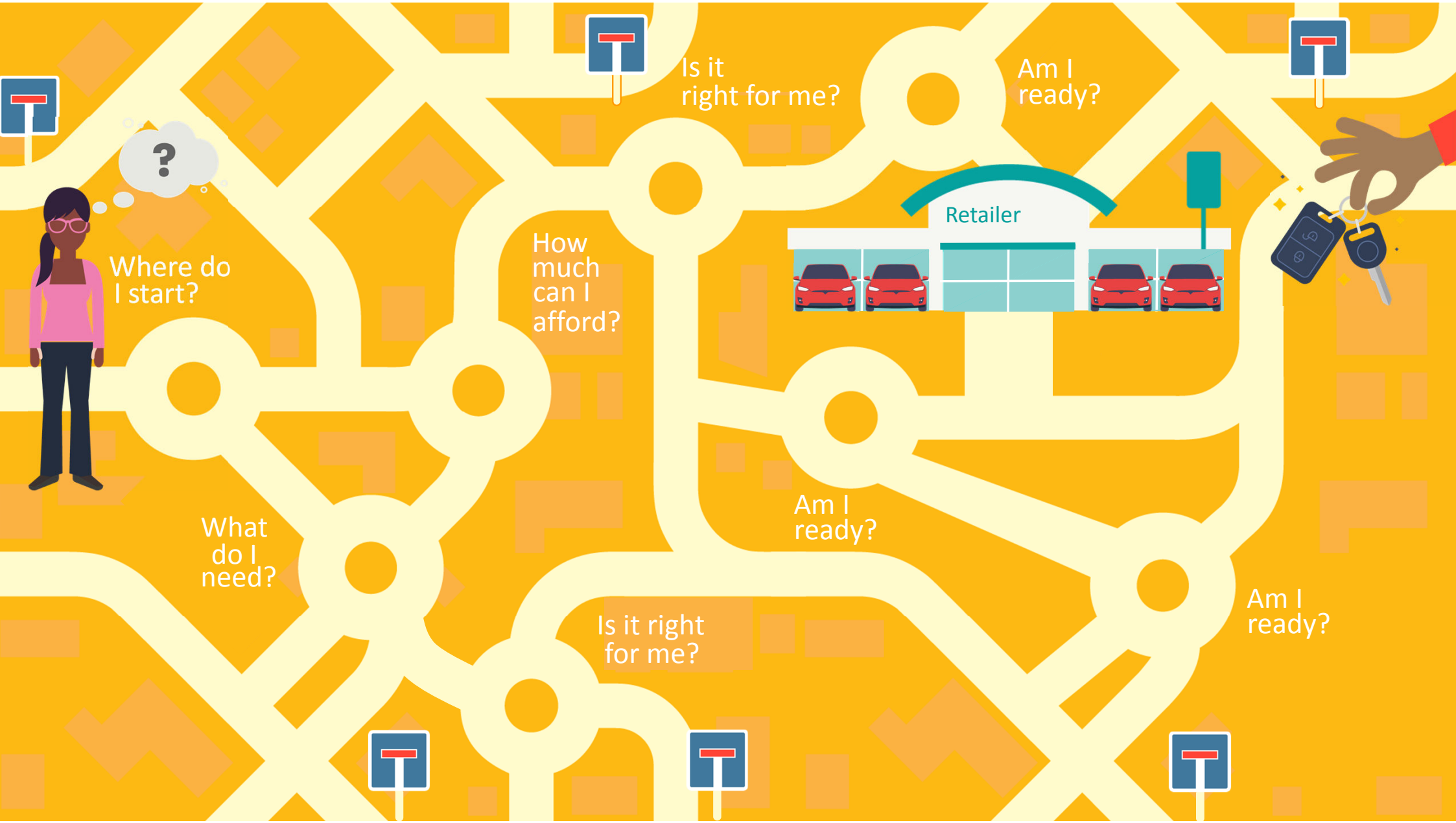
Allow easy comparison between new, used and different makes

Reduce cognitive load by simplifying choice

Simplicity

Clear signposting to help the user understand where they are

Transparency



Where do I start?

What do I need?

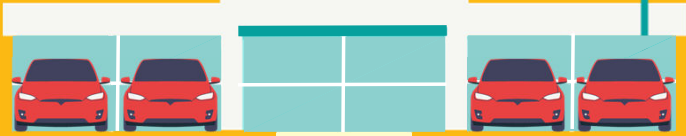
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Is it right for me?

Am I ready?

Am I ready?

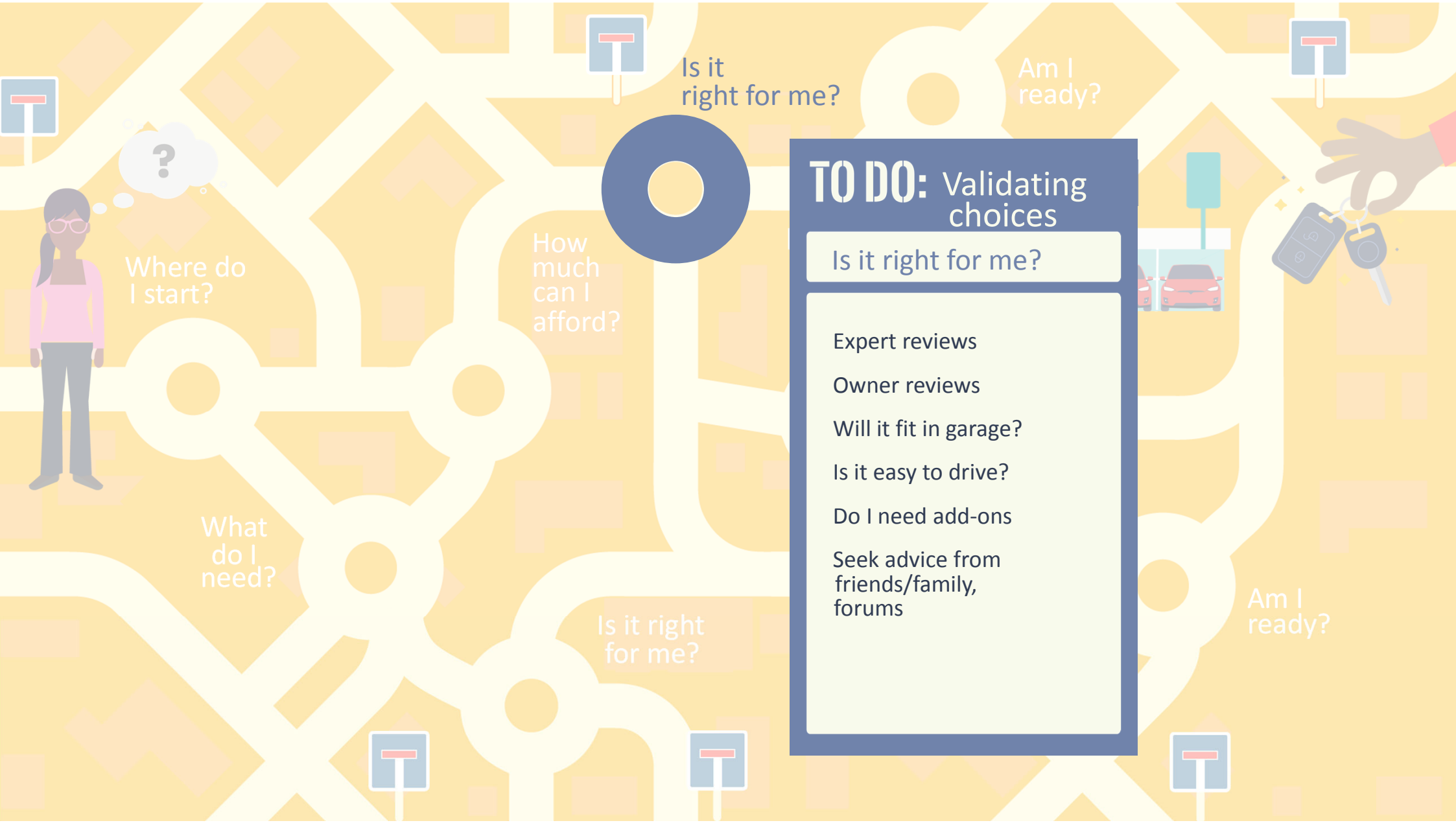
Retailer



Am I ready?

Is it right for me?





Where do I start?

What do I need?

How much can I afford?



Is it right for me?

Am I ready?



Am I ready?

## TO DO: Validating choices

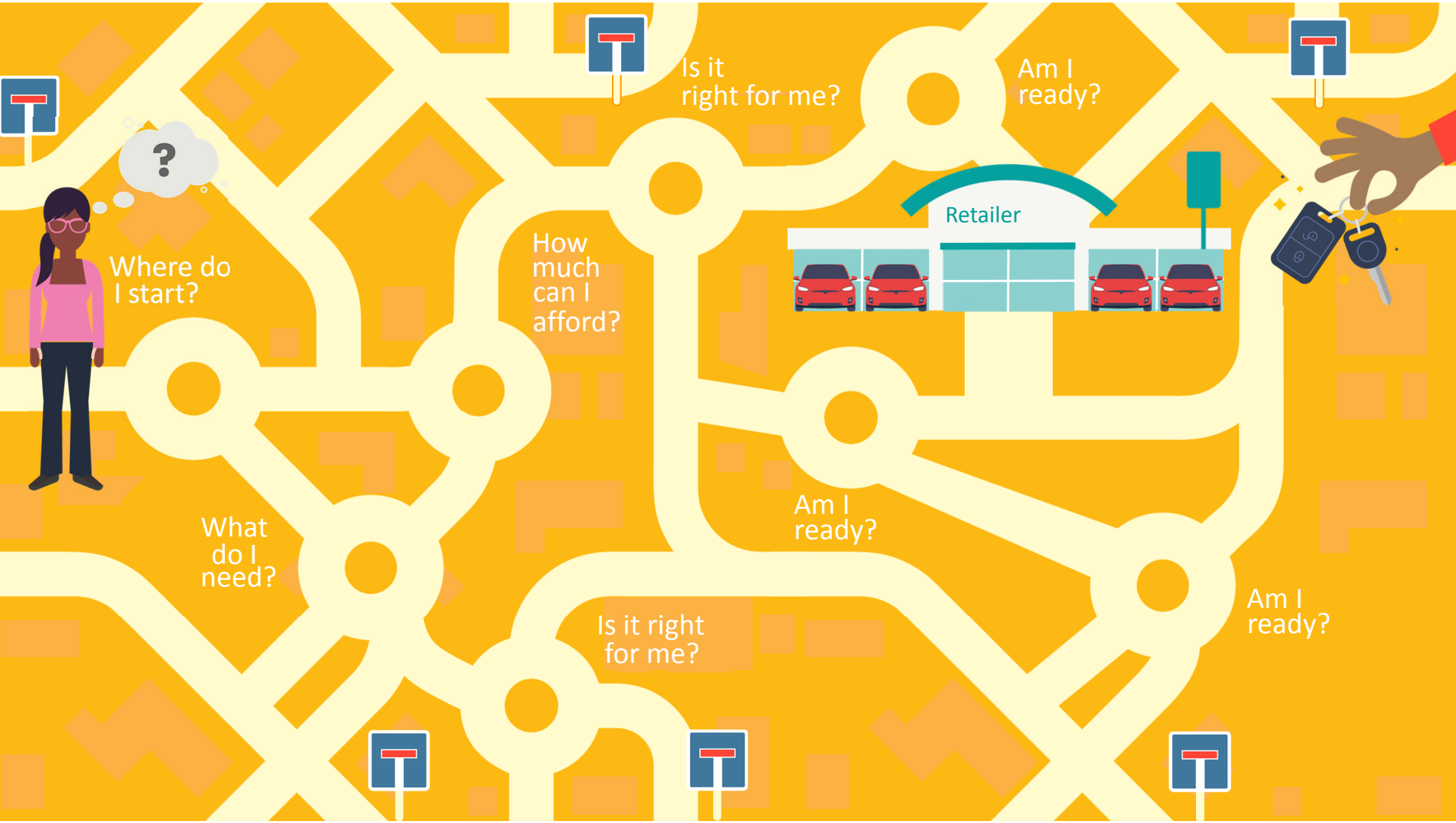
Is it right for me?

- Expert reviews
- Owner reviews
- Will it fit in garage?
- Is it easy to drive?
- Do I need add-ons
- Seek advice from friends/family, forums

90%

worry about  
Making the wrong  
decision





Where do I start?

What do I need?

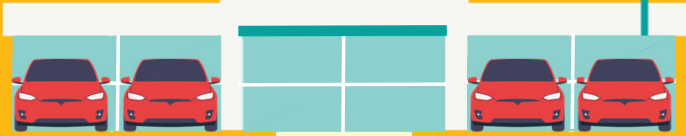
How much can I afford?

Is it right for me?

Am I ready?

Am I ready?

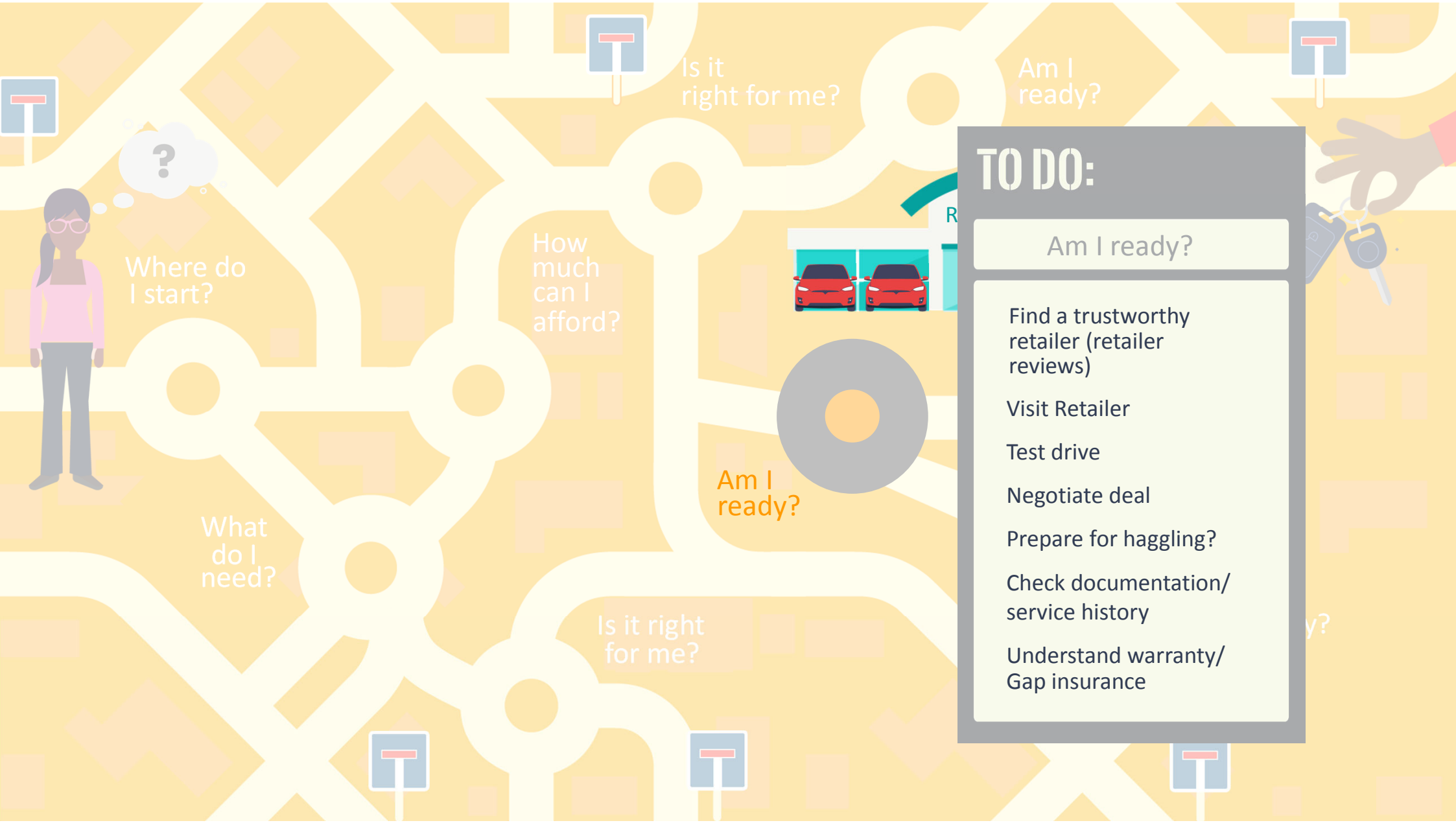
Retailer



Am I ready?

Is it right for me?





Where do I start?



How much can I afford?

Is it right for me?

Am I ready?



Am I ready?

Is it right for me?

## TO DO:

Am I ready?

Find a trustworthy retailer (retailer reviews)

Visit Retailer

Test drive

Negotiate deal

Prepare for haggling?

Check documentation/ service history

Understand warranty/ Gap insurance



# 86%

who bought **new**  
were helped to move  
forward in one way or  
another

vs.

only

# 72%

who bought  
**used**

## Retailers play a huge role in helping people progress

	Bought New	Bought Used
Speaking to a helpful retailer	34%	26%
Being offered a good deal from a retailer	32%	28%
The exact car being in stock	29%	22%
Having more information on the spec of the car	21%	18%
Using a good comparison website	15%	18%
Not having to haggle	18%	22%
Advice from a friend / family member	15%	20%
Having clear and transparent finance options	21%	10%
Being able to filter better	12%	9%

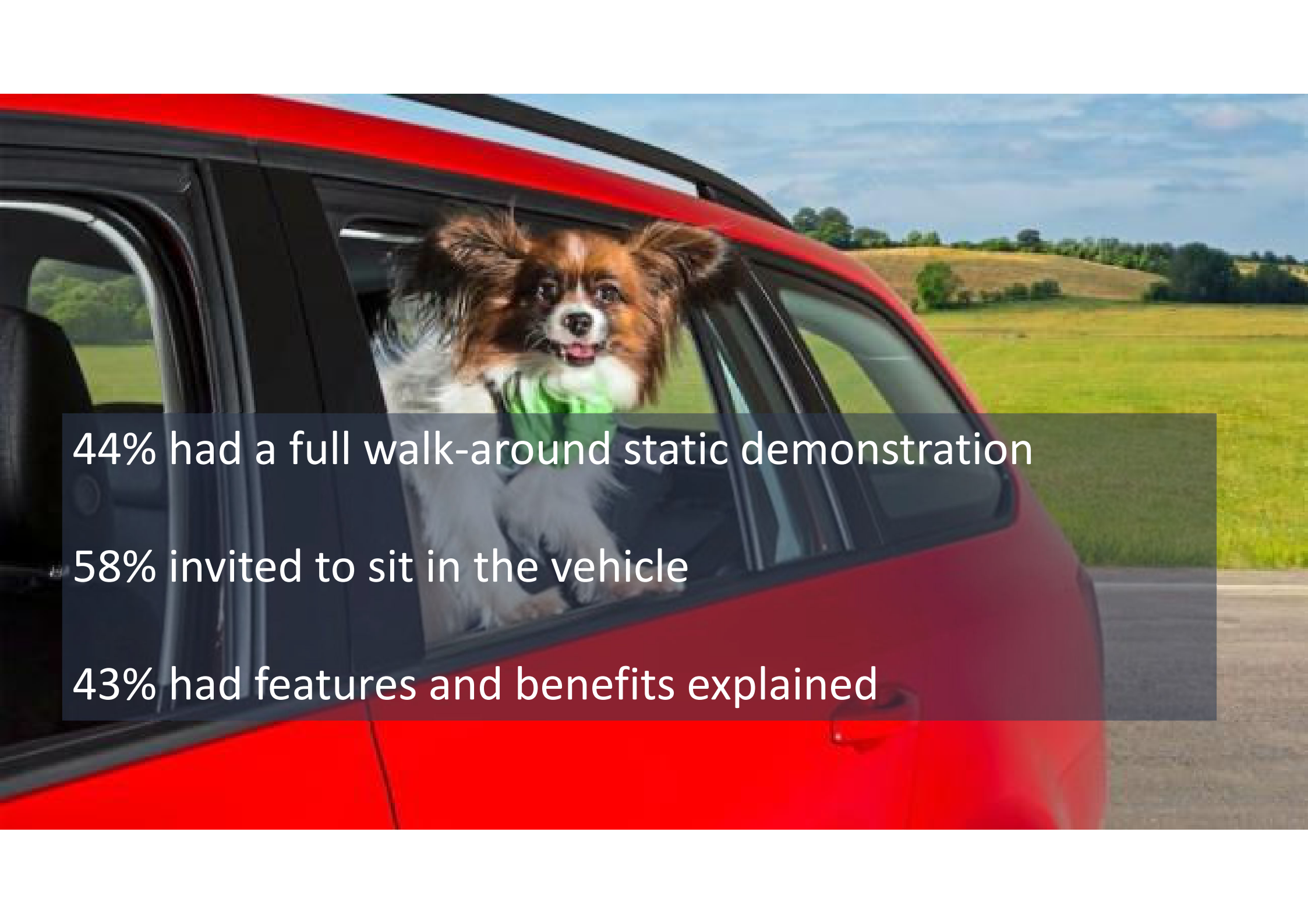


Dealership

52%

just walk in





44% had a full walk-around static demonstration

58% invited to sit in the vehicle

43% had features and benefits explained

Only 47% had a clean,  
tidy car to test drive...



22%

not offered a  
test drive at all...



What do Netflix, mattresses and sex toys have in common?

FREE Hybrid Duvet worth up to £195 with Mattresses (Excl Bunk) code [DUVETDAYS](#) (T&C's)

2 8 46 18  
DAYS HRS MINS SECS



Free delivery & returns



100-night trial



10-year guarantee



0% finance payments



"Best mattress in the world right now"

# Simba Hybrid® Mattress

★★★★☆ 31,478 Reviews

The award-winning mattress from Europe's favourite mattress-in-a-box brand. Experience the support 2,500 specially designed pocket springs with adaptable memory foam in five layers of perfect comfort.

SIMBA uses [Cookies](#) to give you the best possible shopping experience. ✕

Lovehoney.com

(F)

Keep working on telling me why you did each step.

Word problems (2 part problems)  
Show 2 different ways to solve each problem and explain your thinking.

1. Davis had 25 toy cars. On Monday he gave Diego 4 cars and on Tuesday he gave Hunter 8 cars. How many cars does Davis have now?

13 cars

$$\begin{array}{r} 25 \\ - 4 \\ - 8 \\ \hline 13 \end{array}$$

$$4 + 8 = 12$$

Why? I used 25 cars. Draw a picture. Then I subtracted 4 cars. After that I subtracted 8 cars. My final sum is 13 cars.

Sum

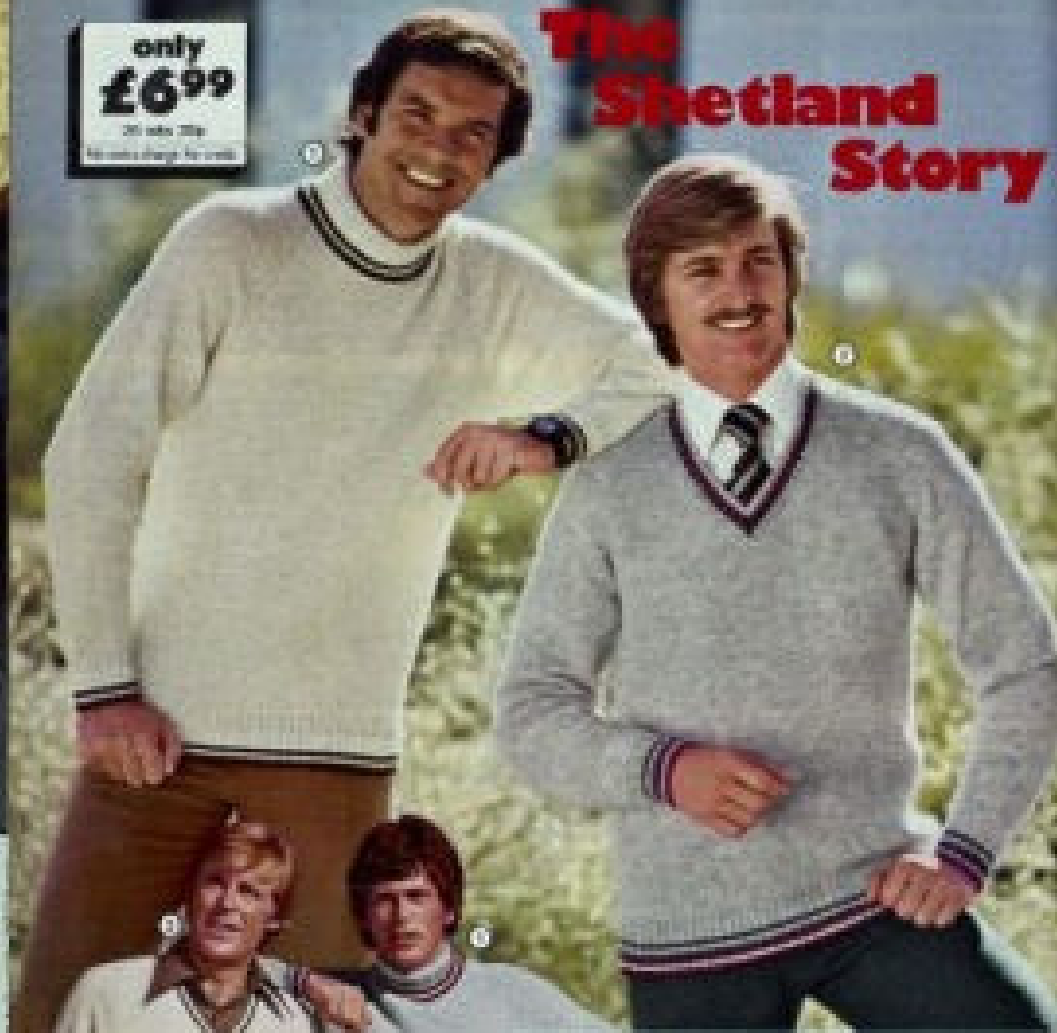
# Endowment effect

**WHO OWNS WHAT?**

A close-up photograph of a hand holding a small, rectangular red sign with white text. The sign is tilted and reads "WHO OWNS WHAT?". The hand is positioned as if presenting the sign. The background is dark, and there is a soft light source from the top left, creating a slight glow on the hand and the sign.

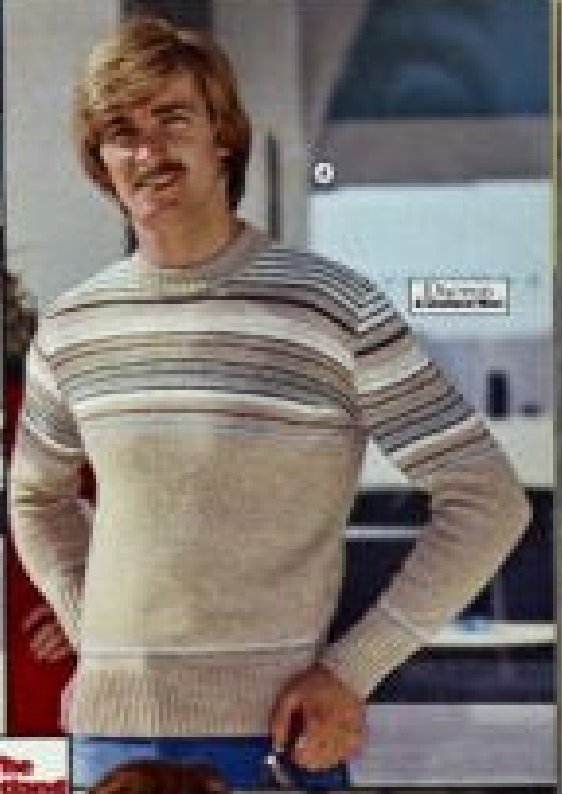
only  
**£6.99**  
on sale from  
all retail shops for cash

# The Shetland Story



**1** Crew Neck Sweater with a contrasting collar and cuffs.  
Material: 100% Shetland Wool.  
Machine Washable.  
Color: White or Grey.  
Chest: 36, 38, 40, 42, 44 in.  
C1281  
1.999. Green Line. 00-00. 20 000 000

**2** Crew Neck Sweater with contrasting collar and cuffs.  
Material: 100% Shetland Wool.  
Machine Washable.  
Color: Grey.  
Chest: 36, 38, 40, 42, 44 in.  
C1282  
1.999. Green Line. 00-00. 20 000 000



## The Shetland Story



**3** Crew Neck Sweater with contrasting collar and cuffs.  
Material: 100% Shetland Wool.  
Machine Washable.  
Color: White.  
Chest: 36, 38, 40, 42, 44 in.  
C1283  
1.999. Green Line. 00-00. 20 000 000

**4** Crew Neck Sweater in Green. An easy fit with contrasting collar and cuffs in white and blue.  
Material: 100% Shetland Wool.  
Machine Washable.  
Color: Green.  
Chest: 36, 38, 40, 42, 44 in.  
C1284  
1.999. Green Line. 00-00. 20 000 000

## The Shetland Story

**5** Crew Neck Sweater in Green. An easy fit with contrasting collar and cuffs in white and blue.  
Material: 100% Shetland Wool.  
Machine Washable.  
Color: Green.  
Chest: 36, 38, 40, 42, 44 in.  
C1285  
1.999. Green Line. 00-00. 20 000 000

**6** Crew Neck Sweater with contrasting collar and cuffs.  
Material: 100% Shetland Wool.  
Machine Washable.  
Color: White.  
Chest: 36, 38, 40, 42, 44 in.  
C1286  
1.999. Green Line. 00-00. 20 000 000

**7** Crew Neck Sweater with contrasting collar and cuffs.  
Material: 100% Shetland Wool.  
Machine Washable.  
Color: Grey.  
Chest: 36, 38, 40, 42, 44 in.  
C1287  
1.999. Green Line. 00-00. 20 000 000

## POLYESTER VISCOSER



**1** **Men's Flared Trousers in Corduroy**  
 (shown with long-sleeved shirt) Dark and  
 light colors. Size 30-36, 34-40, 36-42.  
 \$29.95  
 \$29.95  
 \$29.95  
 \$29.95  
 \$29.95  
 \$29.95

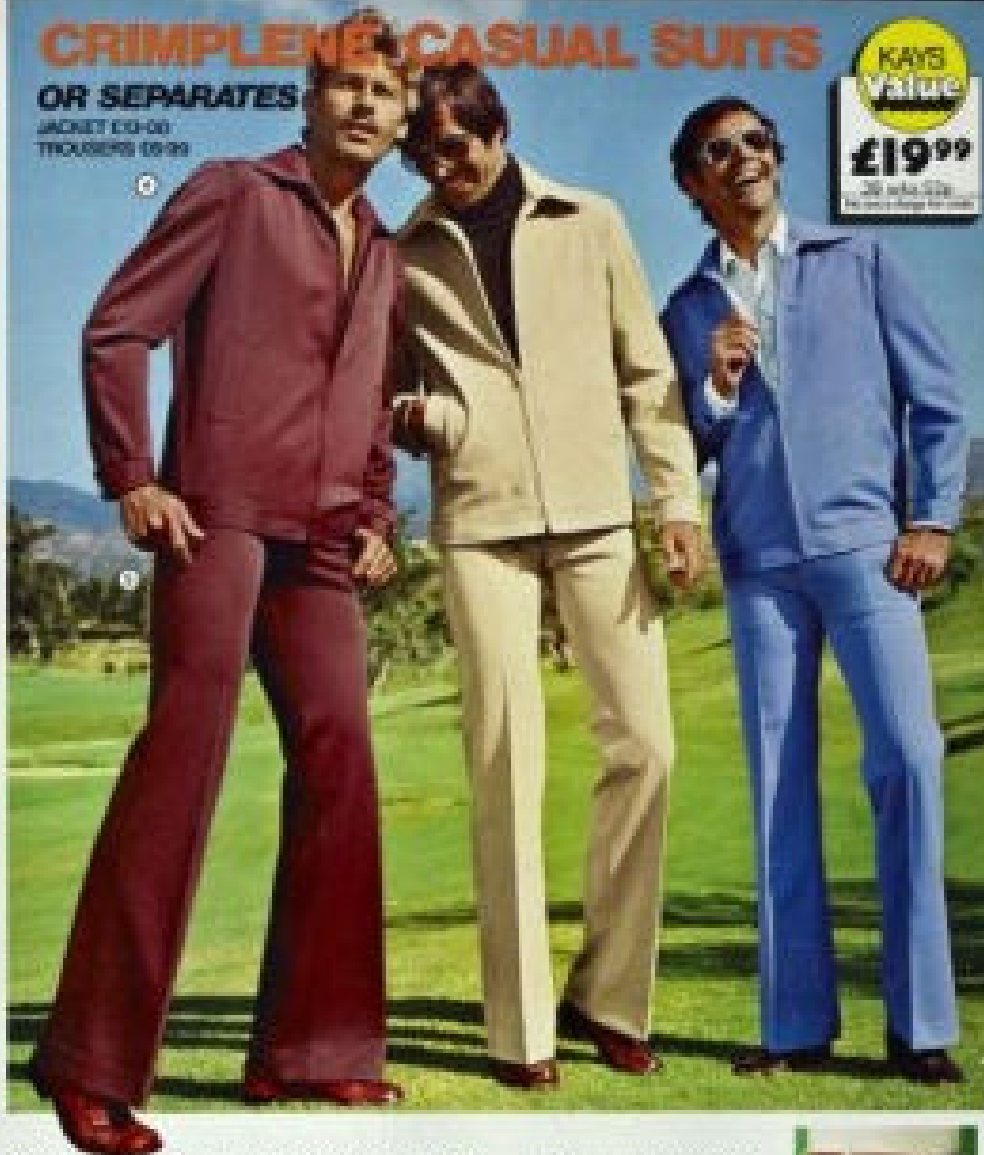
**2** **Men's Polo Shirt in Polyester-cotton**  
 & full-cotton. Available in white and navy blue.  
 \$19.95  
 \$19.95  
 \$19.95  
 \$19.95  
 \$19.95  
 \$19.95

## CRIMPLENE CASUAL SUITS

OR SEPARATES

JACKET £39-59  
 TROUSERS £9-29

**KAY'S Value**  
**£19.99**  
 20% extra value  
 for the next 30 days



**BUY THE COMPLETE TWO-PIECE SUIT  
 or JACKET and TROUSERS separately**

**TROUSERS ONLY £9-29**

**1** **Men's Casual Jacket**

**4** **Men's Casual Trousers**

**5** **Men's Casual Trousers**



# SAFEWAY STORES

DISTRIBUTION WITHOUT WASTE



100001  
Coca-Cola  
BOTTLED BY



**ESSENCE - ~~0.98~~ - F. 0.93**







AVERAGE ATTENTION SPAN  
**HUMAN BEING**

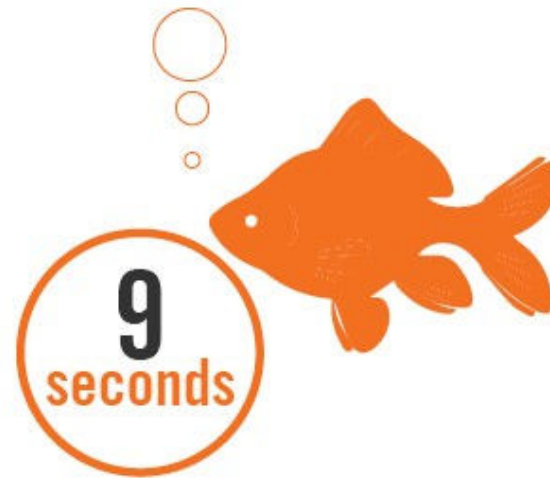
AVERAGE ATTENTION SPAN  
**GOLDFISH**



**12**  
seconds



**8**  
seconds



Source: Notional Center for Biotechnology Information







86%

say it needs to improve

3 in 4

bored of the process

1 in 4


unlikely to finish

 AutoTrader




87%

want to see availability



How long before  
online really takes  
off for car buying?

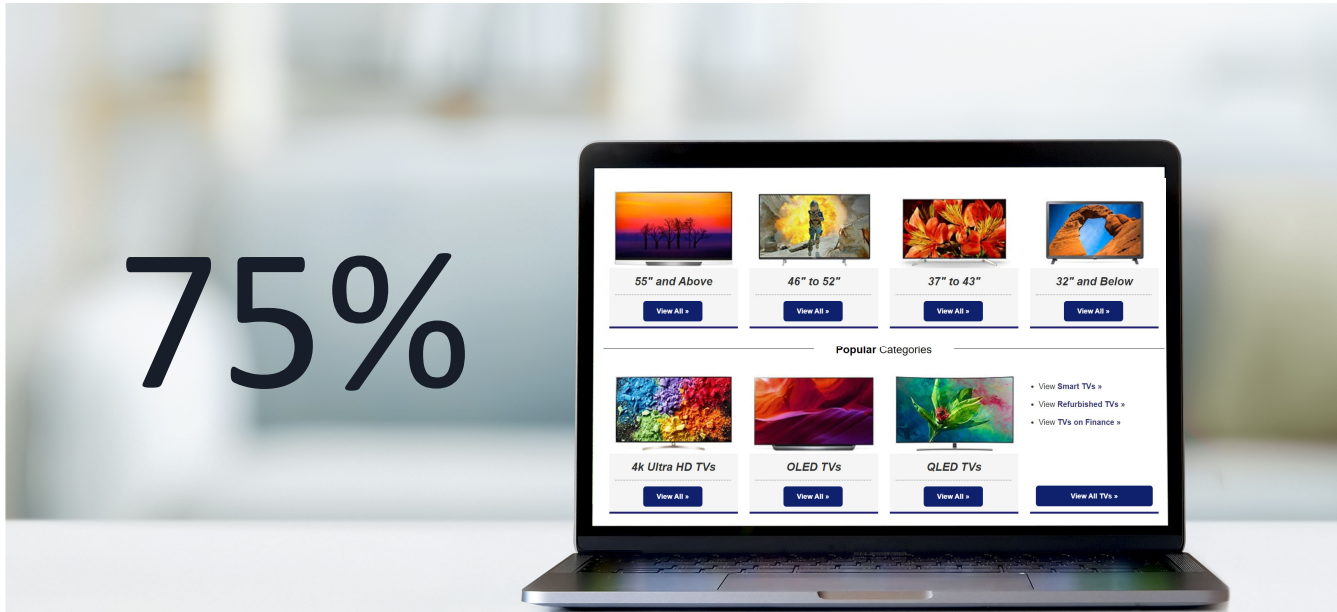
A woman is sitting at a desk in a modern office environment. She is looking at a laptop screen. On the desk, there is a laptop, a coffee cup, and a small speaker. The scene is brightly lit, suggesting a daytime setting.

What do  
people do  
online?

 AutoTrader

A man and a woman are sitting in the front seats of a car. The man is holding a tablet and showing something on the screen to the woman. They both appear to be smiling and engaged in a conversation. The car's interior is visible, including the steering wheel and dashboard.

What do  
they do at  
retailers?



27% would buy a used car online

31% would buy a new car online



43%  
18-34s

34%  
35-54s

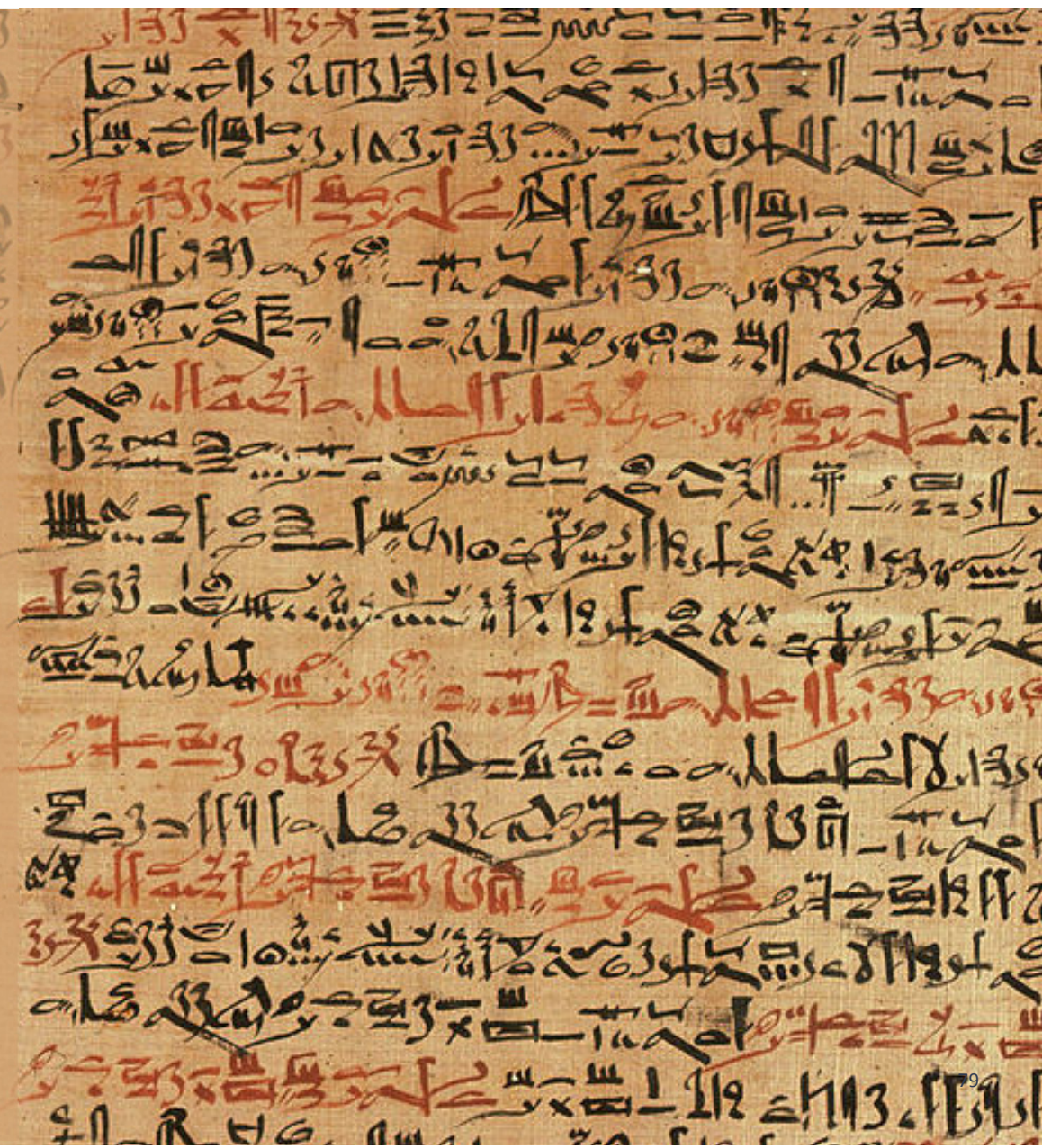
17%  
55+

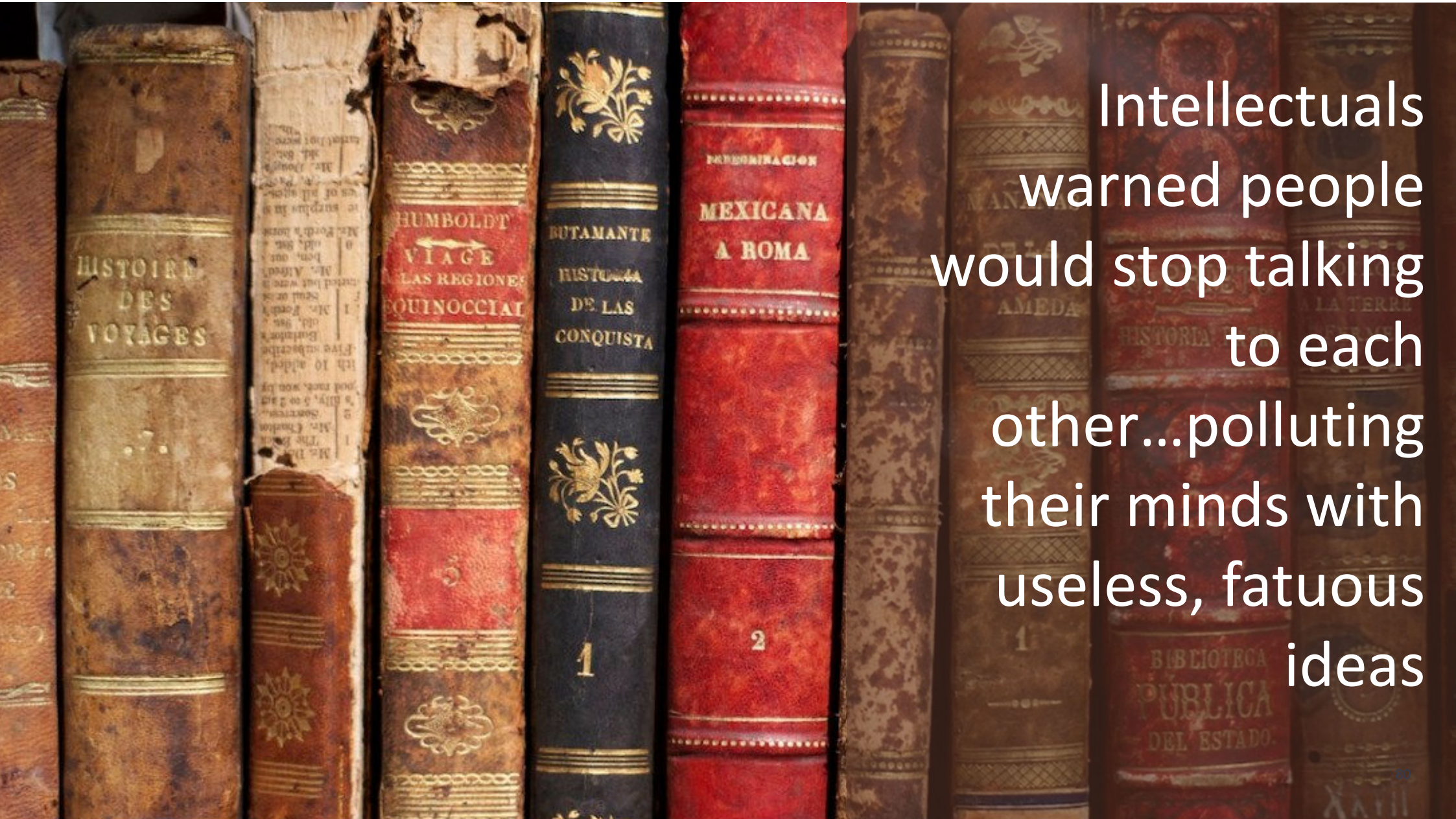
would buy a new  
car online

 AutoTrader



A demonic  
invention that  
will rot the mind  
and needs to be  
stopped





Intellectuals  
warned people  
would stop talking  
to each  
other...polluting  
their minds with  
useless, fatuous  
ideas



So it really could happen but as  
with cash and differing  
ownership models, it will  
compliment not cannibalise...

# 45%

would buy new  
online because  
it's easier to  
compare deals

 AutoTrader



# 50%

would buy new  
online because of  
ease and  
convenience

 AutoTrader



44%

would not buy new online  
because they would not  
be able to test drive

68%

would not buy new  
online because they  
don't want to make large  
purchase without seeing  
it



# 74%

Said they  
wouldn't want to  
buy a car without  
speaking to a real  
person



64%

Would look in person if  
it's worth the money

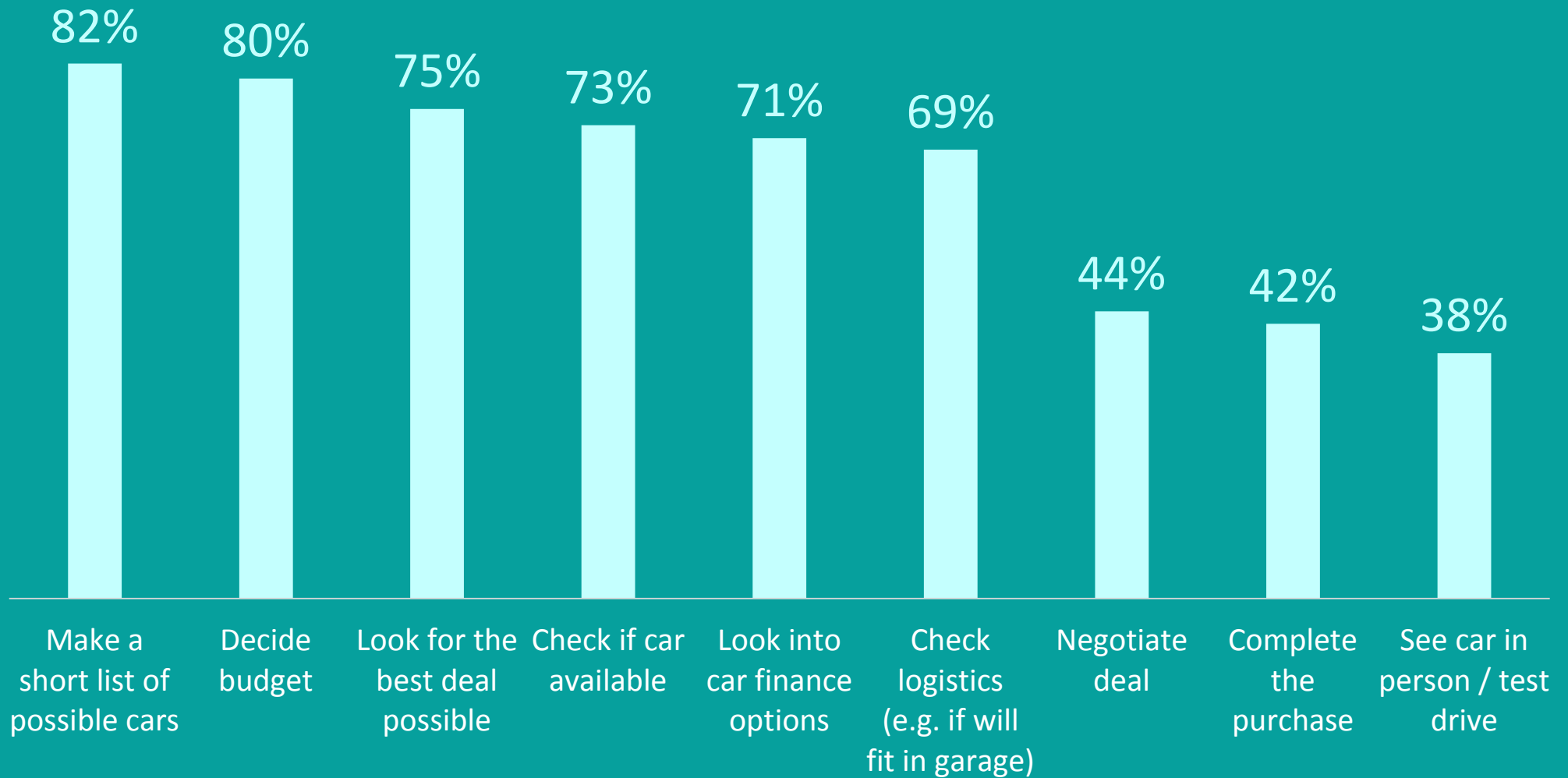
56%

Would look in person to see  
how looks in real life

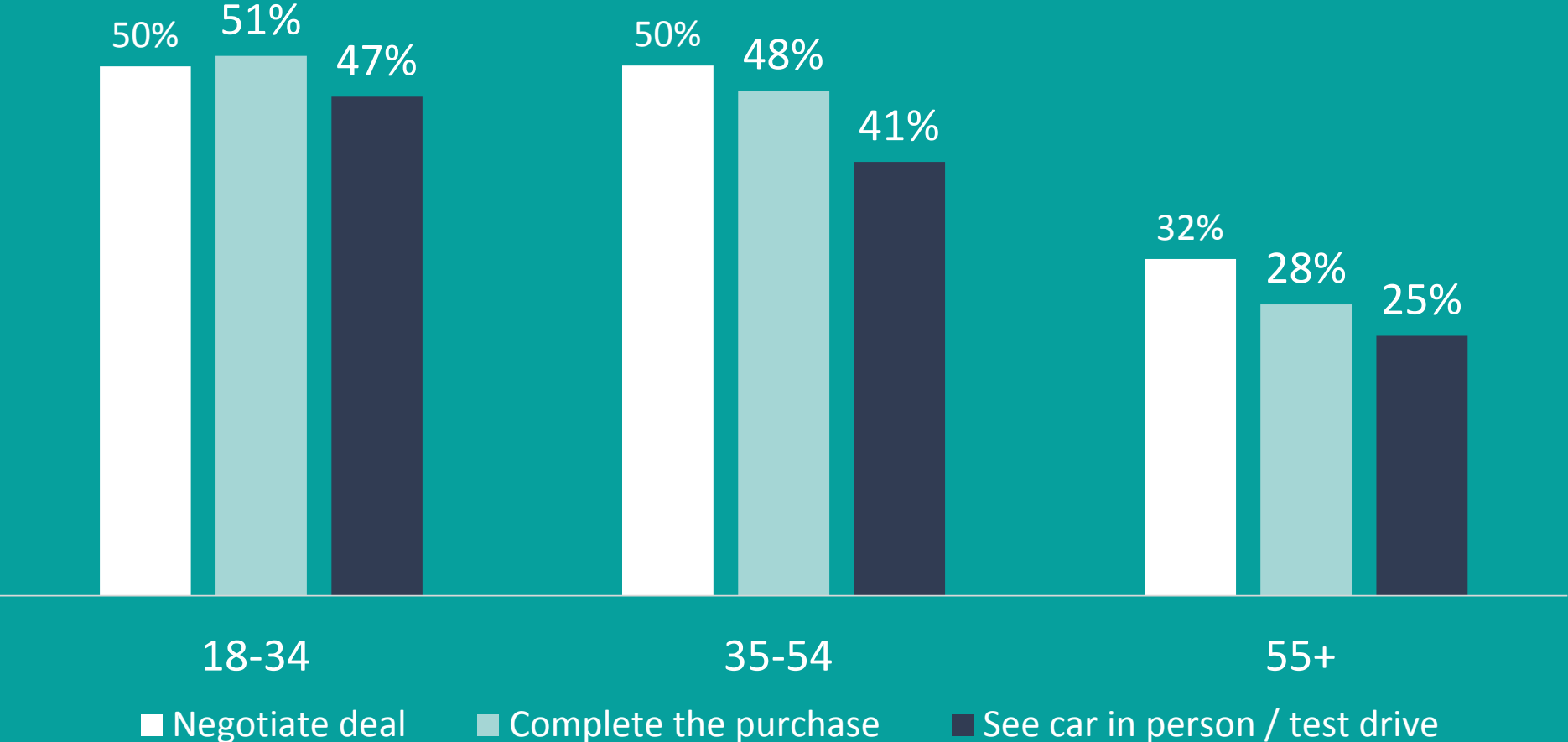


They're not making the final decision, but what will they do without talking to a retailer?

## What car buyer are happy to do without dealership



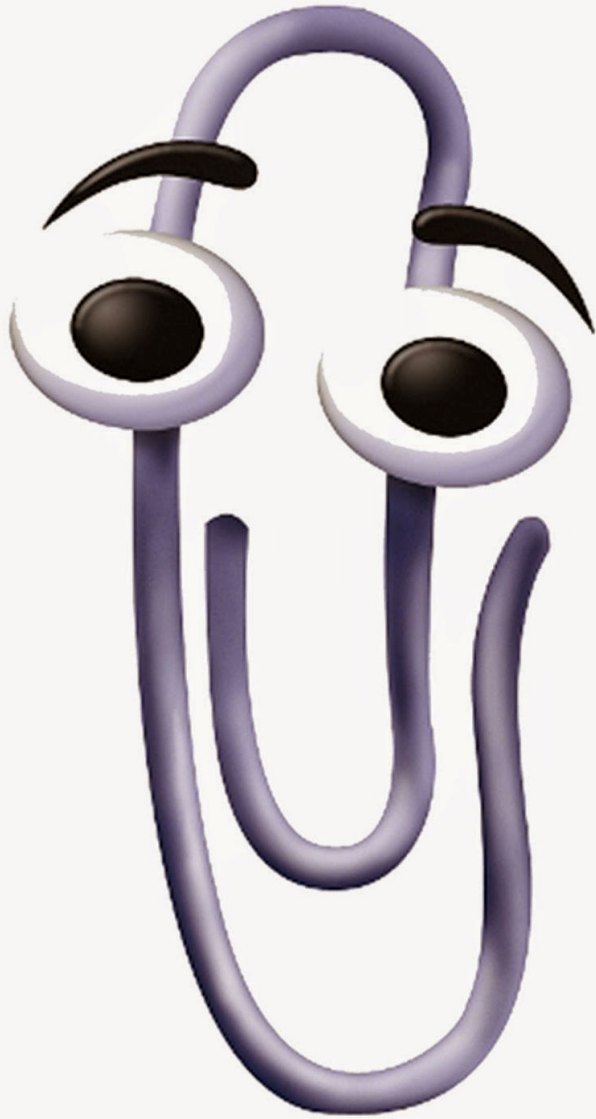
# What car buyer are happy to do without dealership



What could do the jobs  
people currently do at a  
retailer?

ZDF





Hi there,  
Looks like you're trying to  
write a letter...  
Would you like me to help?

# When a chat window pops up on a retailers website...

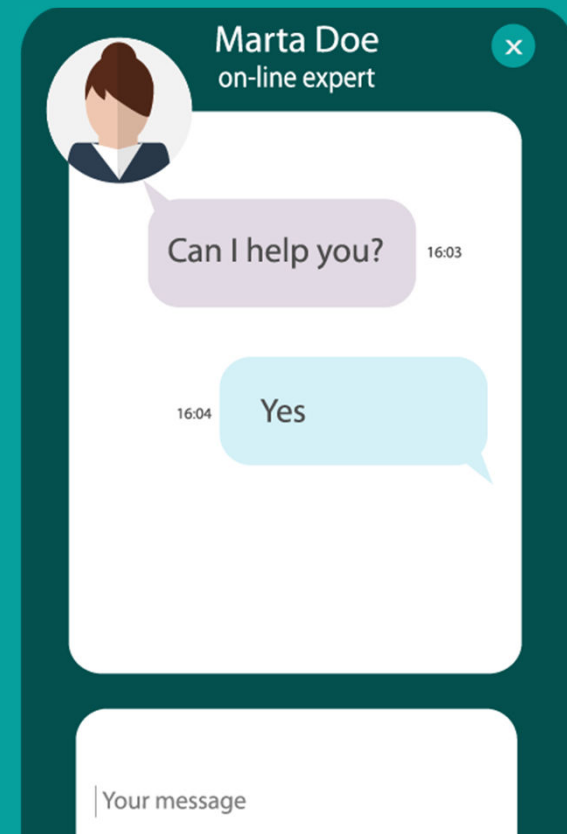
Agreement with statements

38%

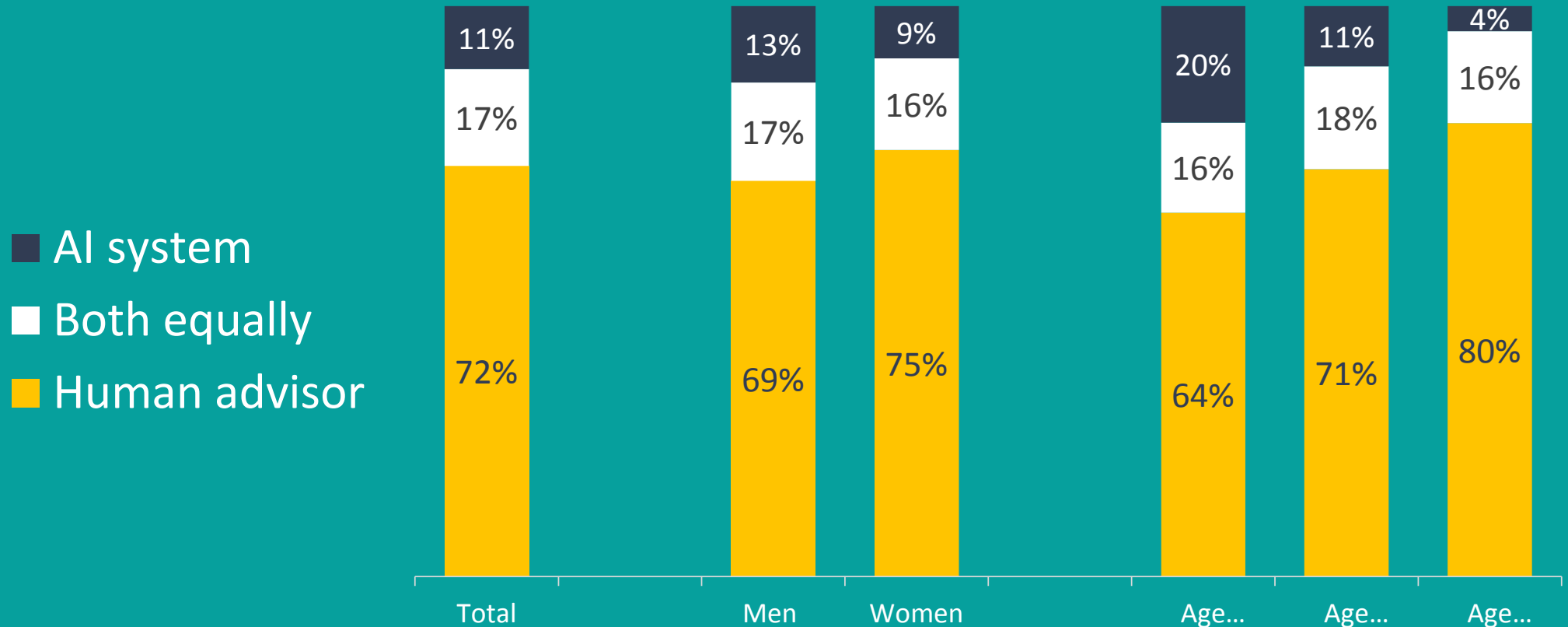
Find it  
annoying

40%

Think it'll be  
hard to speak  
to a real  
person



# Who do you trust more to recommend a suitable car?



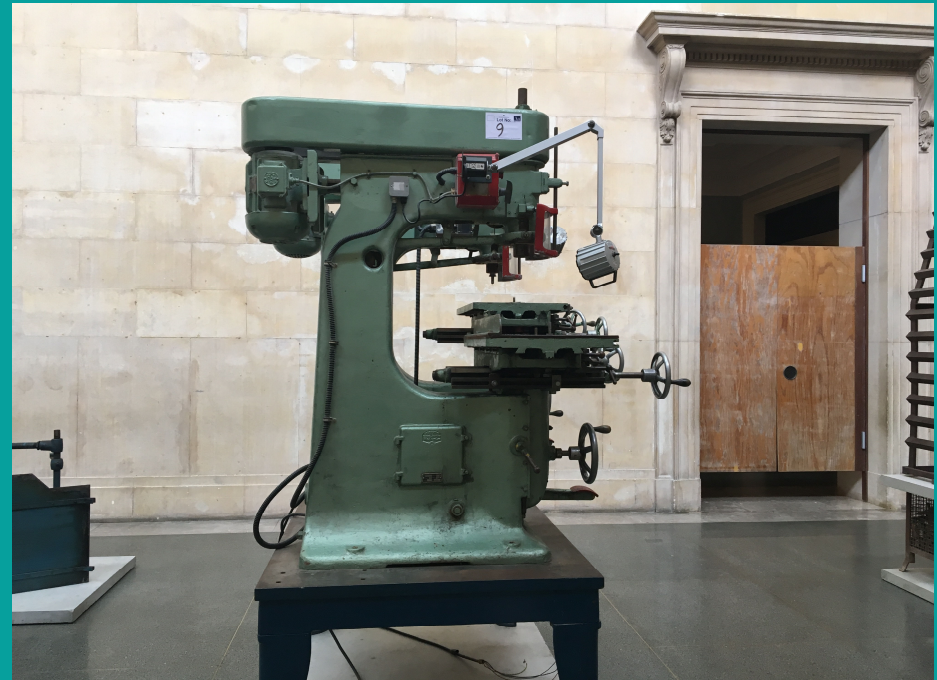
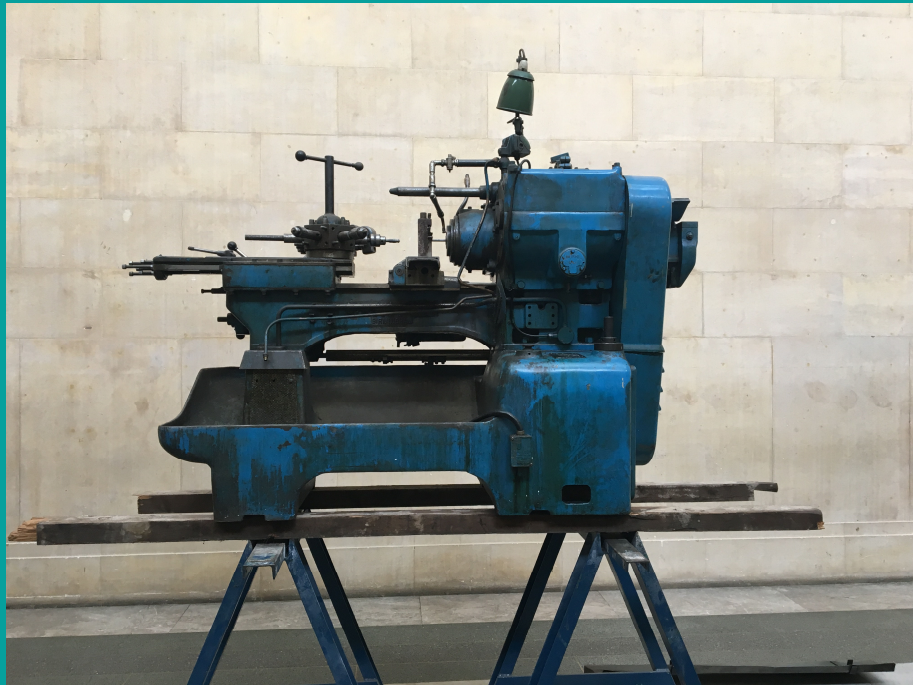
Reassure  
me

Make me  
confident

Give me  
trustworthy  
advice



If de-humanisation is a long way off, what role can tech play in the nearer future?



Almost half  
of future car buyers trust AI to  
find the best deal available

Only 1 in 5 18-34's  
would trust AI that asks about  
your needs and analyses your  
personal data



AI is good for rational not  
emotional jobs

# GOODWOOD HILLCLIMB IN 360°



ROBORACE







P3 | 20

- 2 | LECLERC
- 3 | VETTEL
- 4 | PEREZ

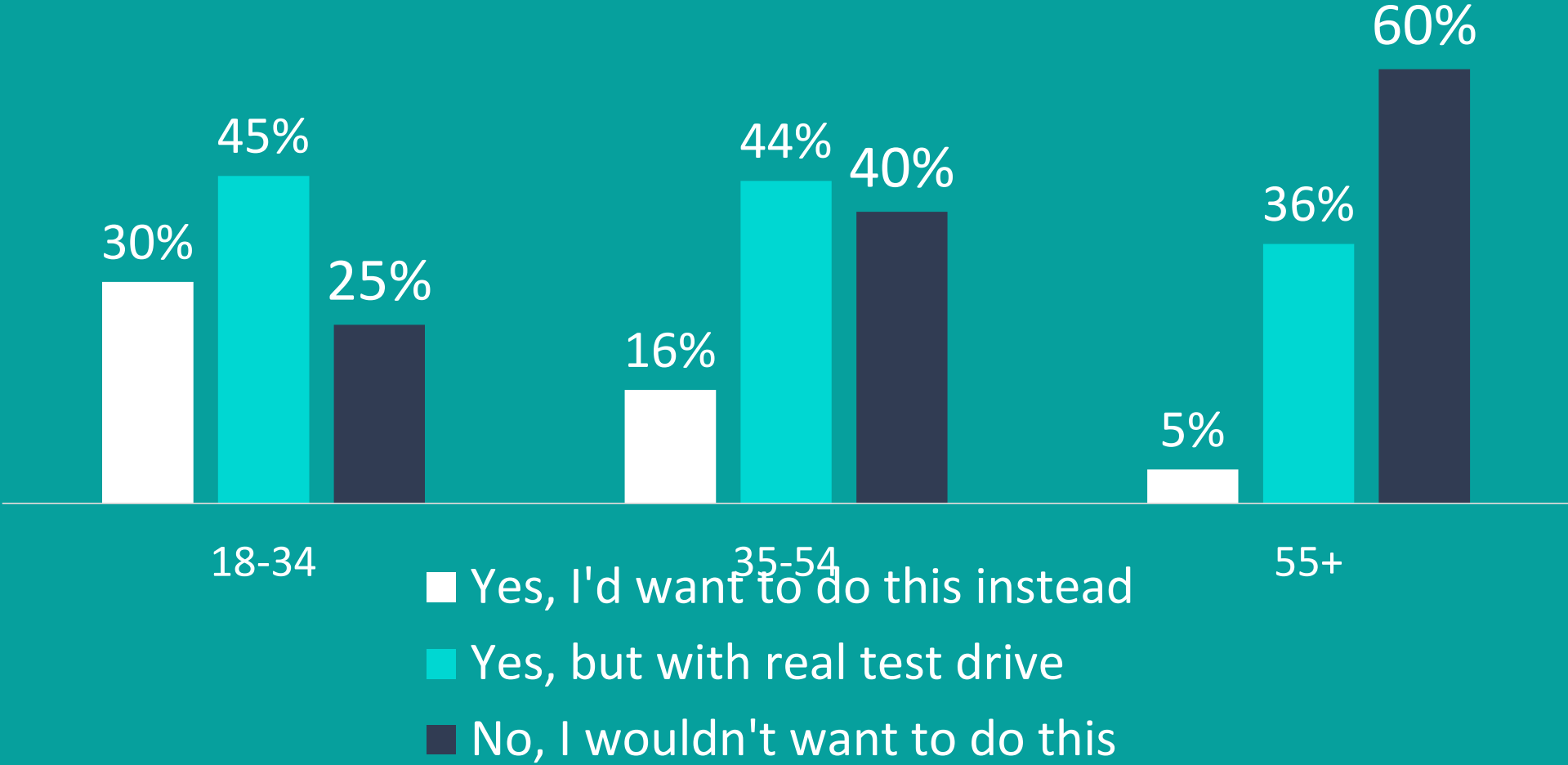
L4 | 13

1:26.849 Best

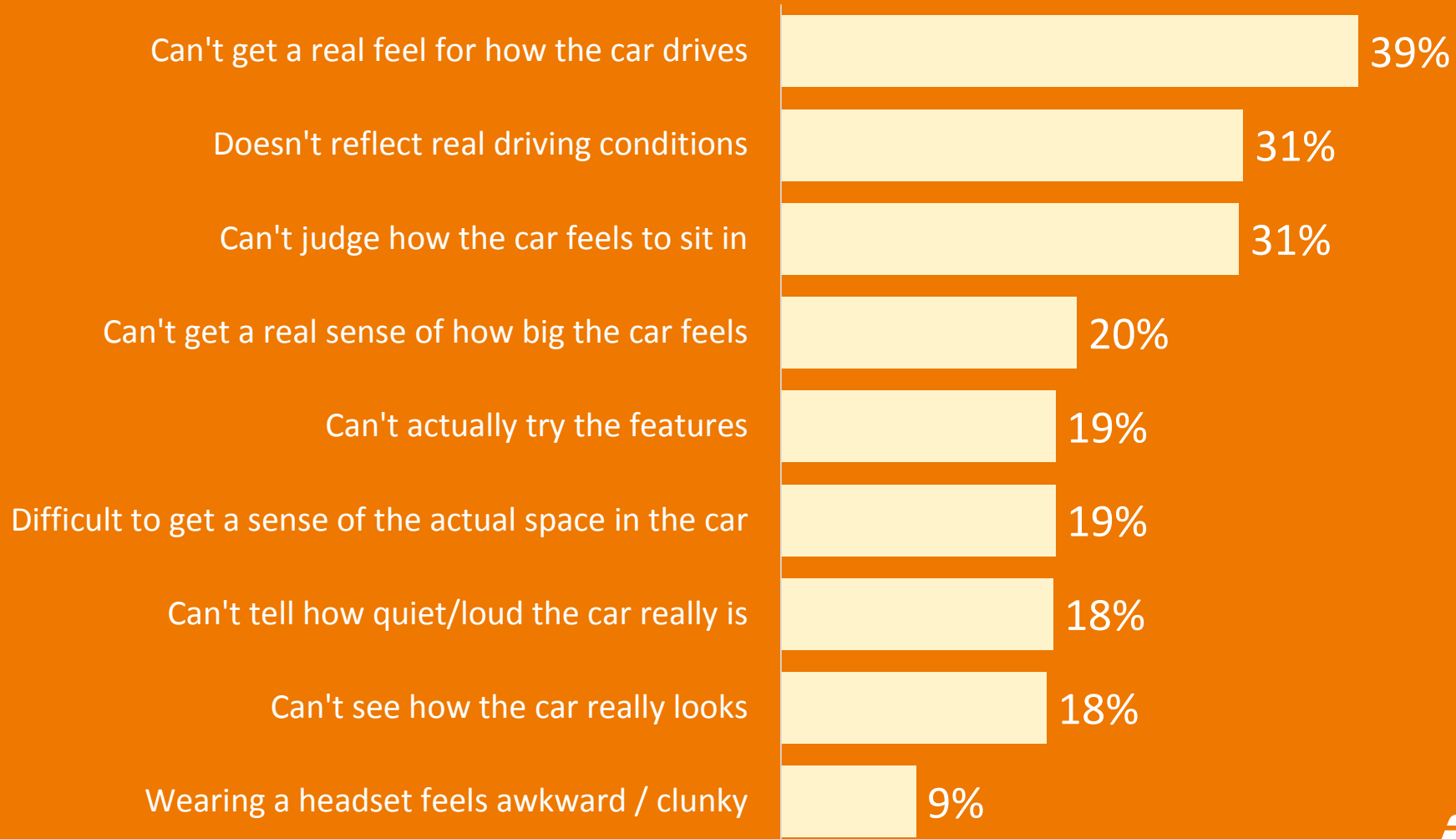
S1	S2	S3



# Is a VR test drive all you need?



# Barriers to VR test






Danger!!

# What job are they doing?

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A person wearing a patterned skirt and dark leggings is silhouetted against a bright, cloudy sky. They are holding a handgun in their right hand. In the background, a densely populated urban area with many small buildings is visible, suggesting a favela or a high-density city neighborhood. The overall scene conveys a sense of urban violence and social inequality.

In 2018, 42 of the world's 50 most violent cities were in Latin America.



Technology hasn't yet found its  
role in fixing the pain

What can you do now to start  
making a difference?

Transparency around price is  
holding people back from  
buying cars online

Price  
transparency  
within the  
industry is poor



**88%**  
agree that car  
prices should be  
clearer

**75%**  
think that it's difficult to  
work out the actual price  
you'll pay

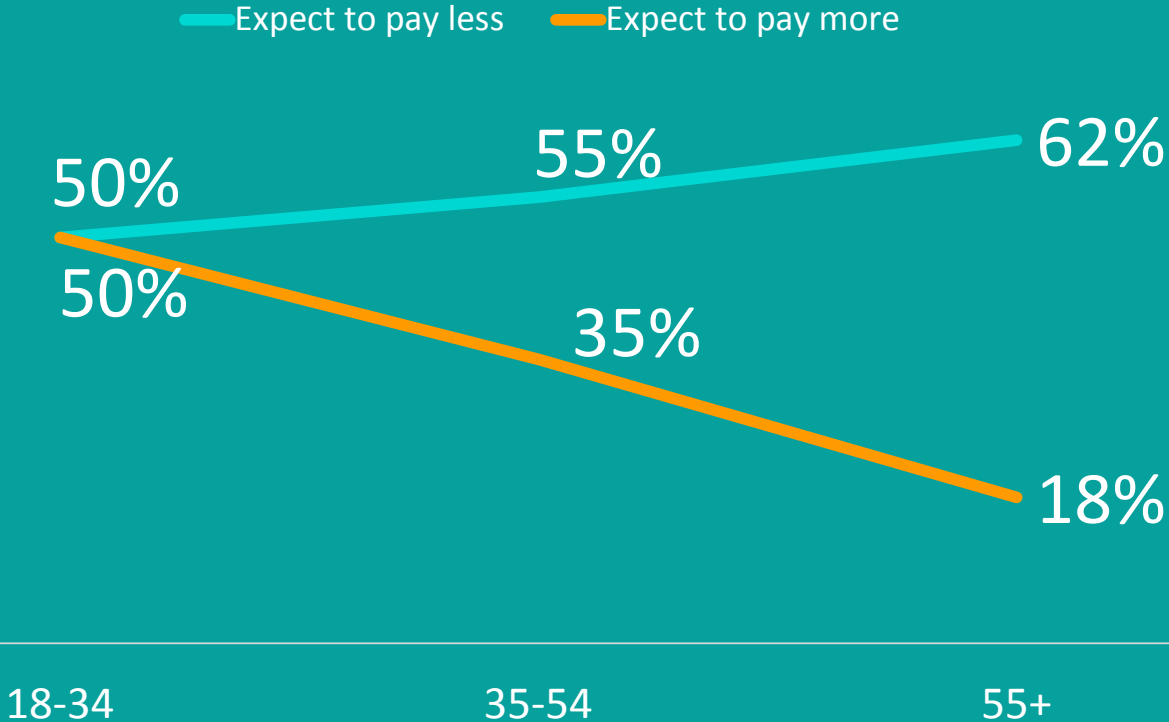
**73%**  
feel they often see the  
same / similar vehicles at  
different prices

**59%**  
feel car prices are deliberately  
confusing

**66%**  
don't trust the price  
advertised and expect  
hidden fees

Half of 18-34s think they'll end up paying more, linked to trust caused by lack of price transparency

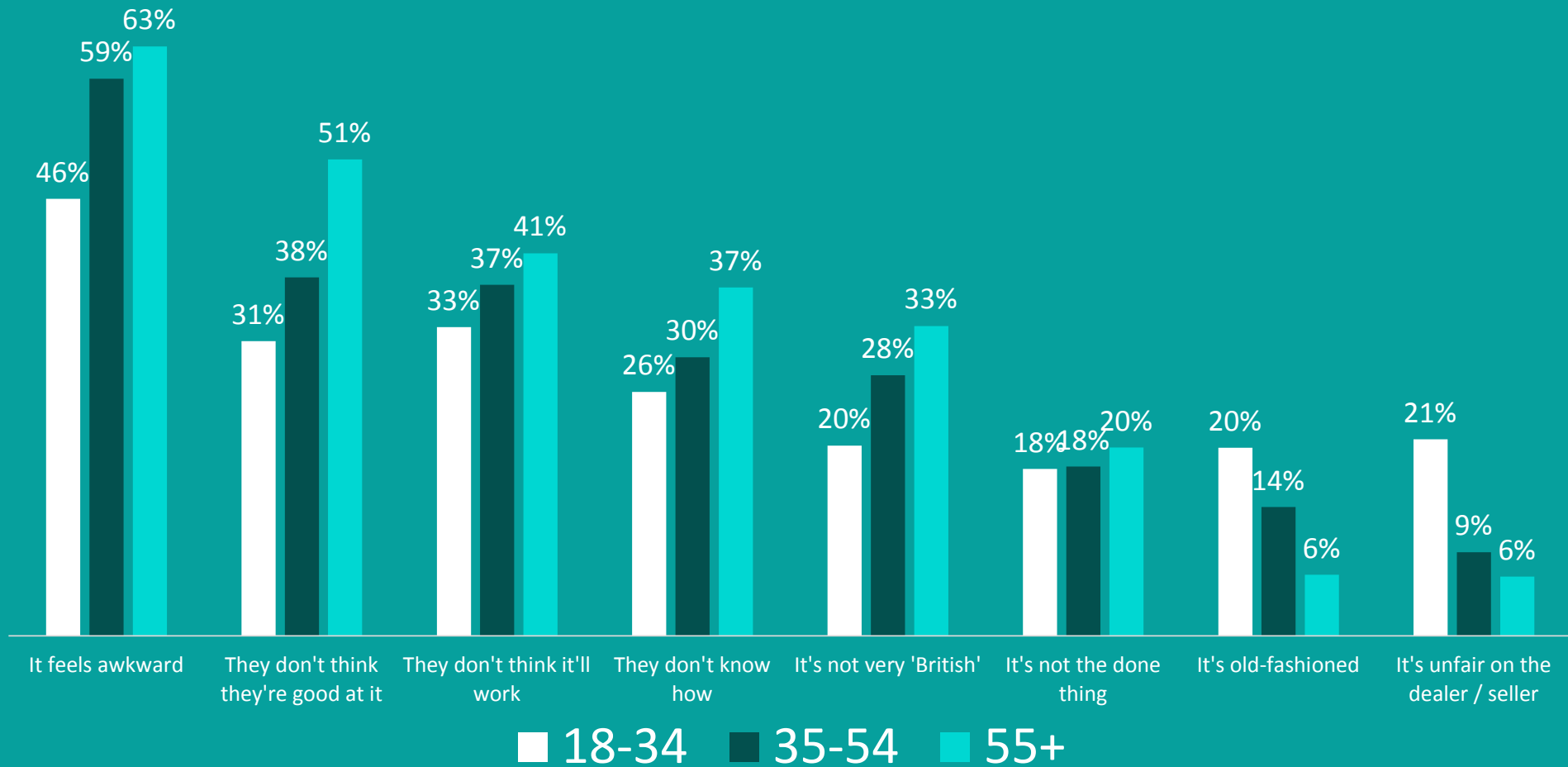
Amount expected to pay vs advertised price – by age



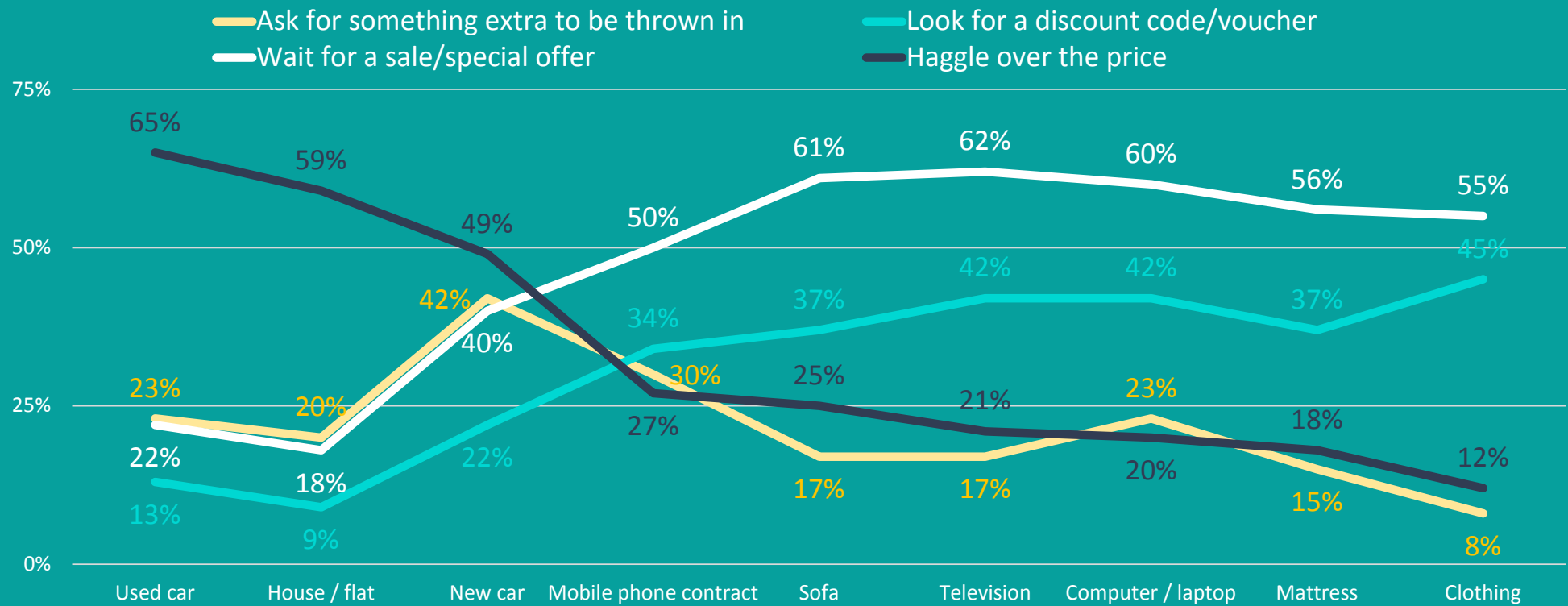


# Haggling

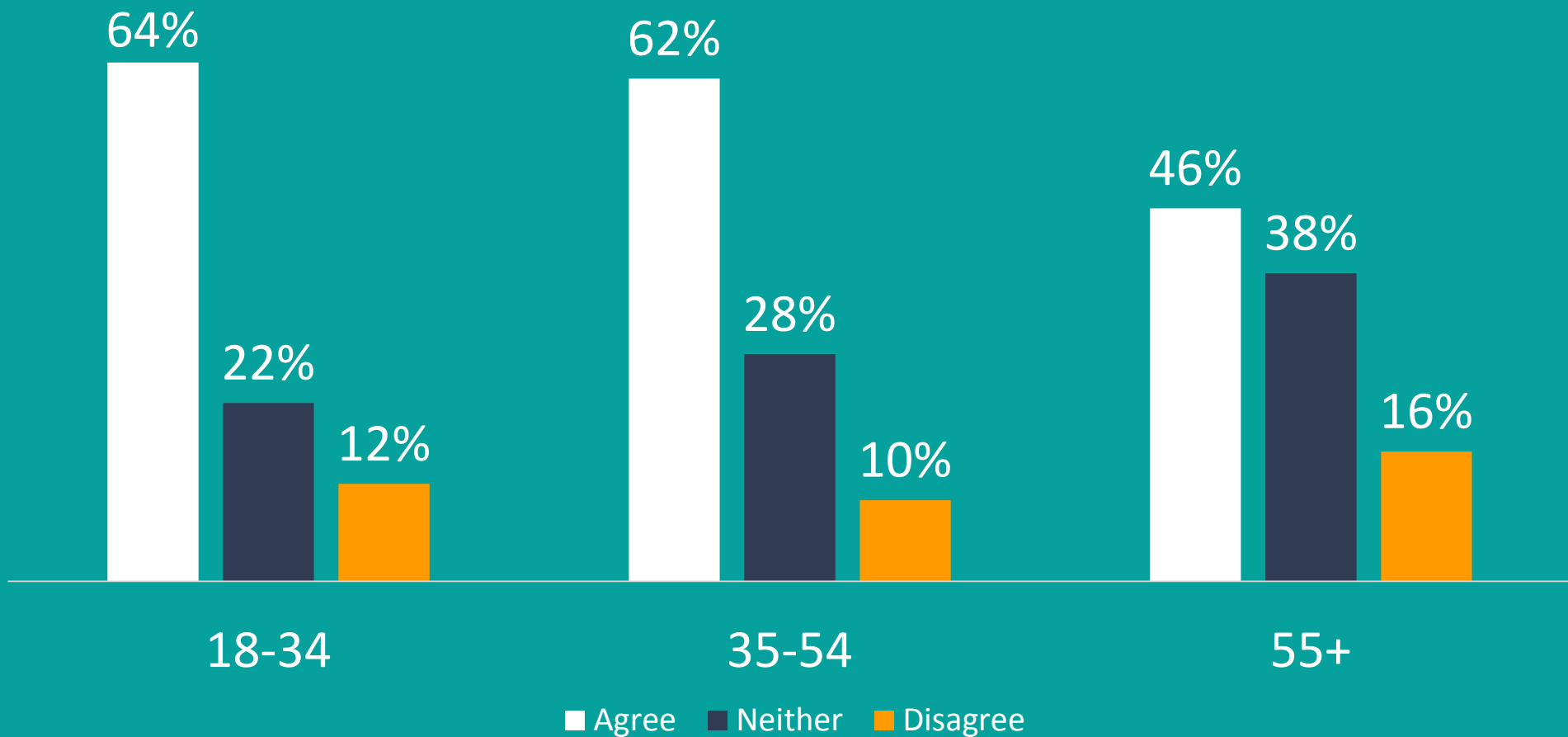
# Haggling reluctance



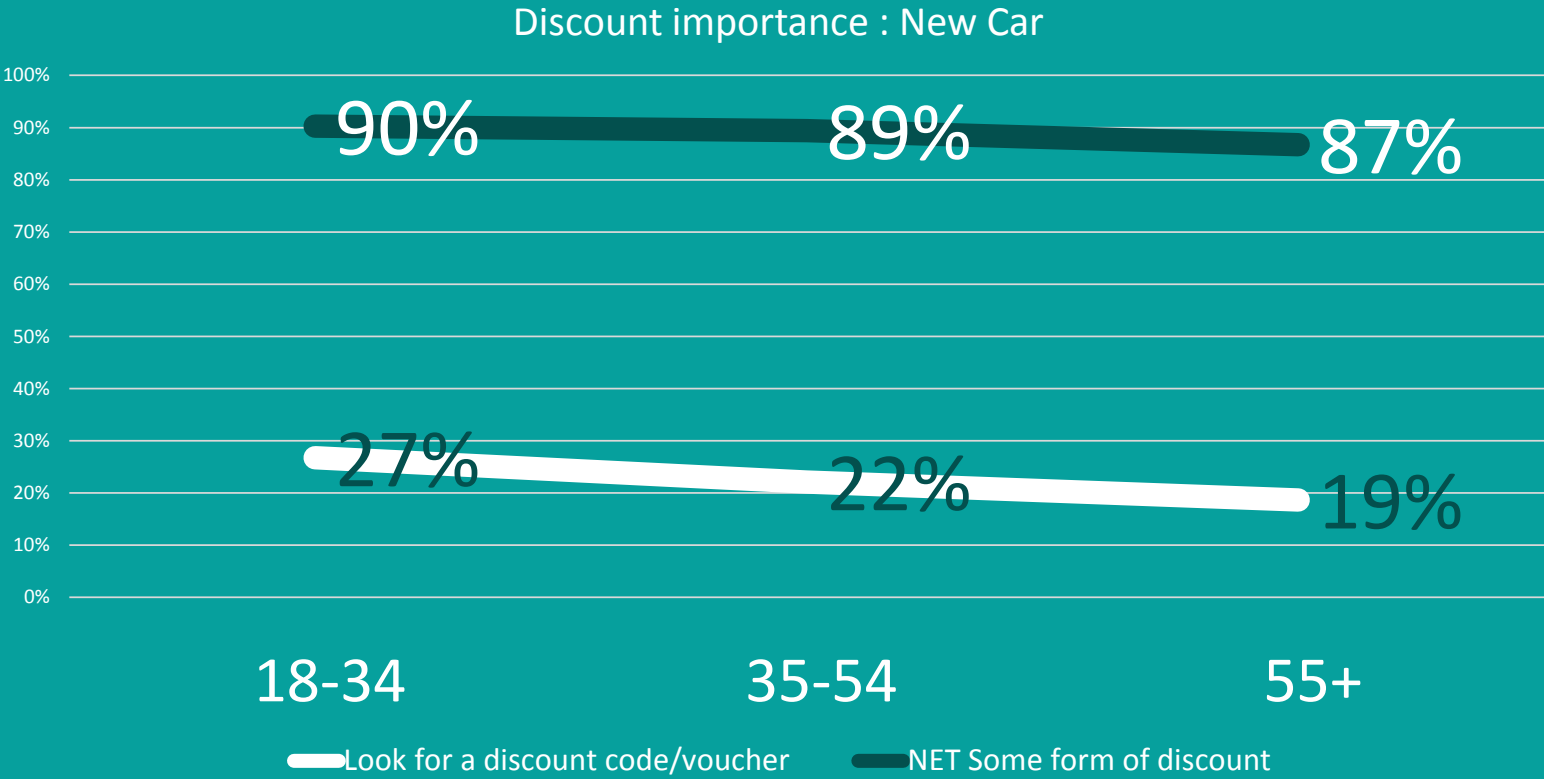
# People are reluctant to pay full price for anything



2 in 3 below 55 say they are less likely to haggle if cars are sold online...Important, but what would make that possible?

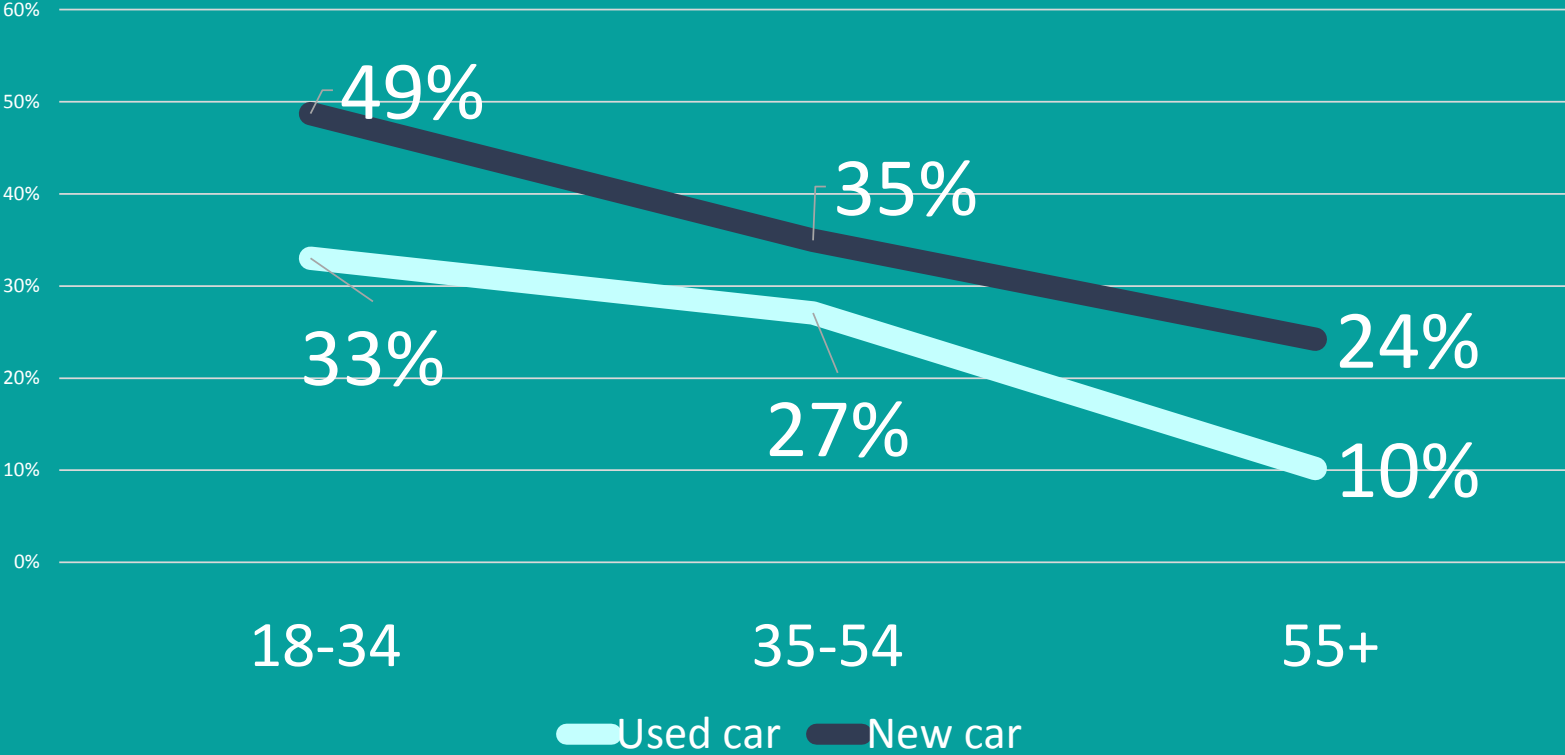


Everyone wants some kind of discount and over a quarter of 18-34 look for a voucher...



Half of younger buyers will wait for a sale / special offer before buying a new car and third of 35-45

### Wait for a sale/ special offer





Only systemic  
change will have an  
impact

Prices need to be  
clear, consistent and  
comparable...

...so people know  
they're getting the best  
deal available, without  
needing to haggle

Jobs not journeys



Jobs to be done make people 'showroom-ready'.



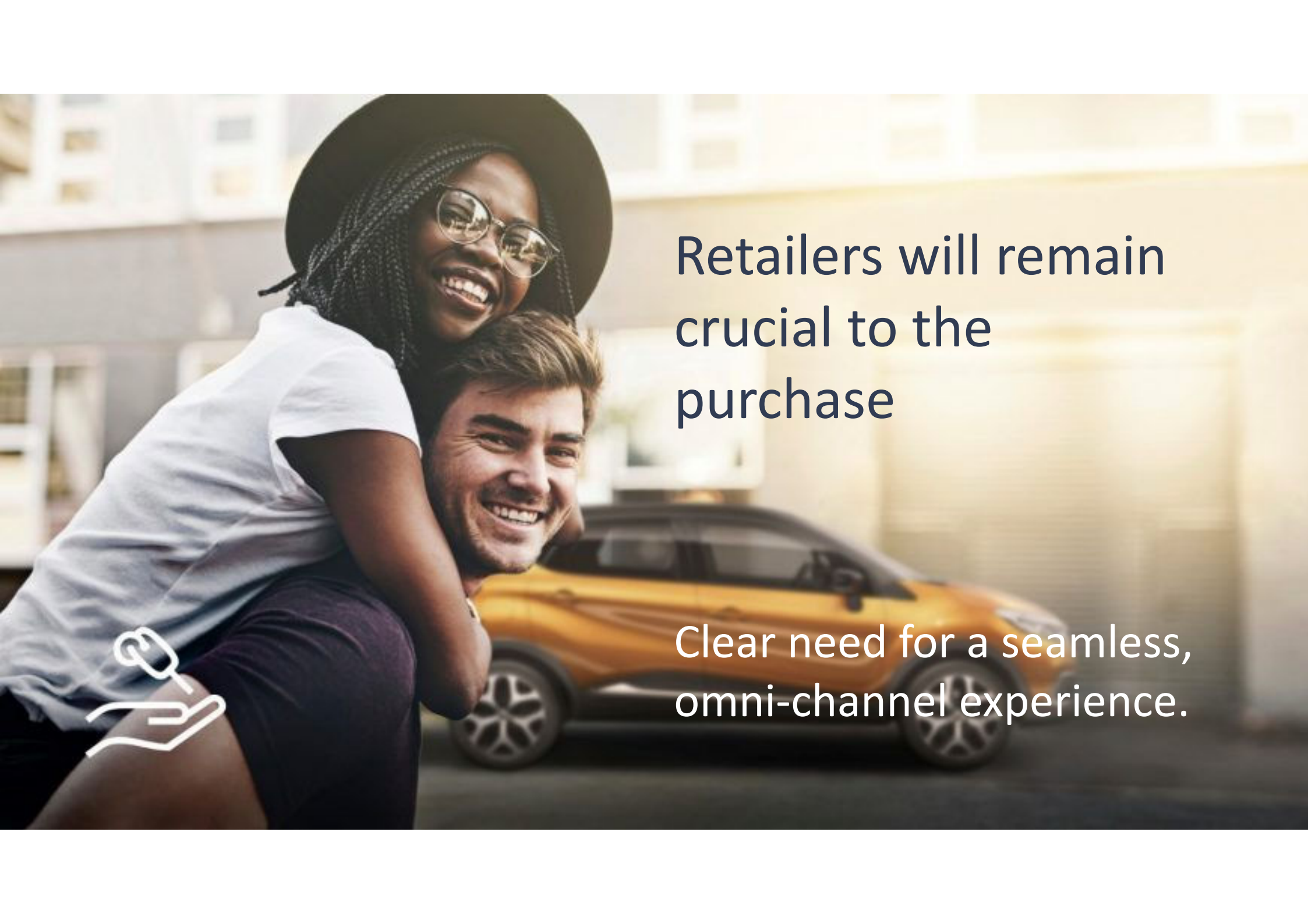
Right car

Right retailer

Right time

Only half  
where asked  
if they wanted to  
buy the car





Retailers will remain crucial to the purchase

Clear need for a seamless, omni-channel experience.



Choose the  
journey that's  
right for them.

Flexible enough and  
'blended' enough

 AutoTrader



c.70%

of consumers' time is  
spent online

c.85%

of retailer's spend is  
offline



# 1 in 3

would buy a car more often if it was easier

## How?

It's not AI or VR, its simply transparency.

 AutoTrader



# Thank you!

@nchking

@atinsight

Nick.king@autotrader.co.uk

 AutoTrader