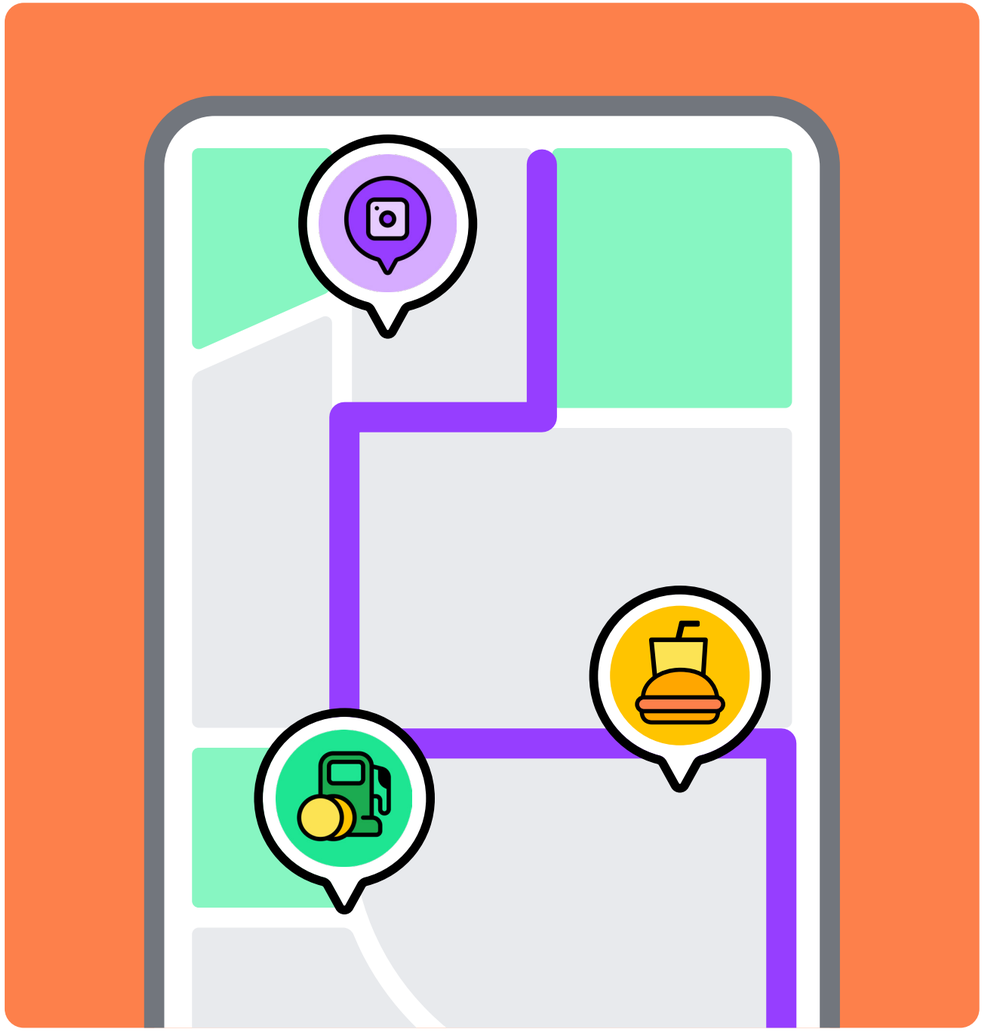
Waze knows

The drivers of today and what's fuelling their purchasing decisions



waze

Foreword

The last two years have upturned UK mobility habits. Emerging from COVID-19 related lockdowns, essential journeys and capacity restrictions, we've returned to the roads in a more significant, less predictable way than ever. At Waze, we also returned to the drawing board to establish when, where and why drivers are choosing to drive and buy now.

We answer these questions through our collaboration with Ipsos, diving into drivers' behaviours, motivations and engagement opportunities to the very last mile. We reveal UK driving preferences, purchasing traits and the context behind a journey, so you can make better advertising decisions and ensure your key messages travel further.

Ruairidh Roberts
Country Manager, Waze UK

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Executive summary

Signals and signposts

The car door shuts. The ignition starts. A driver sets off on their journey to a predefined destination.

As an advertiser, have you already missed your best opportunity to influence this individual? Or are you looking at a valuable captured prospect?

This is a critical question for brands looking to reach the on-the-go driving category – and it's one this report seeks to answer.

But there are also other big questions advertising decision makers need to be considering. The landscape for drivers has altered over the past two years. The COVID-19 pandemic has led to long-lasting lifestyle changes for many, energy costs and inflation are hitting consumers in the pocket, and fuel costs are at record highs. Old assumptions about drivers, the way they behave and their motivations for doing so, can no longer be relied upon to base informed advertising decisions on.

It's time to take a fresh look. How has driving to the shops been impacted by the rise in e-commerce? What kind of buying spontaneity are drivers showing when they are in their cars? How powerful is advertising to consumers on-the-move? As a result of research – drawn from an online survey conducted on our behalf by Ipsos, and our own data – Waze knows the answer to these and many other important questions.

This report reveals that consumers' relationship with the car is changing. And this has big implications for how advertisers engage on-the-go drivers. For starters, the figures show that driving patterns have changed for many since the pandemic. And crucially, having the ability to drive is now seen as being more important.

> "This report reveals that consumers' relationship with the car is changing."

We have also identified five key driving purchase behaviours

Most drivers prefer to drive to the shops than buy goods online

1

The UK has the highest percentage of e-commerce buyers in Western Europe,[1] with weekly internet retail sales 59% higher in February 2022 compared to February 2020.[2] Yet despite this surge in e-commerce, drivers still prefer to drive to buy their goods rather than buy them online and have them delivered. It's true for almost all categories asked about – but especially groceries (68% vs 17%).

2

UK drivers are deal hunters

There is a growing trend for shopping locally – driven by the pandemic but expected to continue afterwards.[3] But many drivers will still make purchase destination choices based on cost and value – even if that means driving further. For example, 76% of drivers would drive past a petrol station to buy fuel if they knew they could get it cheaper a little further away.

UK drivers like to plan ahead

3

Many drivers like to plan ahead, both for purchases – where 65% say they always do so – and shopping destinations. Navigation apps are being used to help them to do it, and not just for the route – they are also being used to find parking options and to search out businesses, retailers or services in a specific area.

Drivers make spontaneous purchase decisions

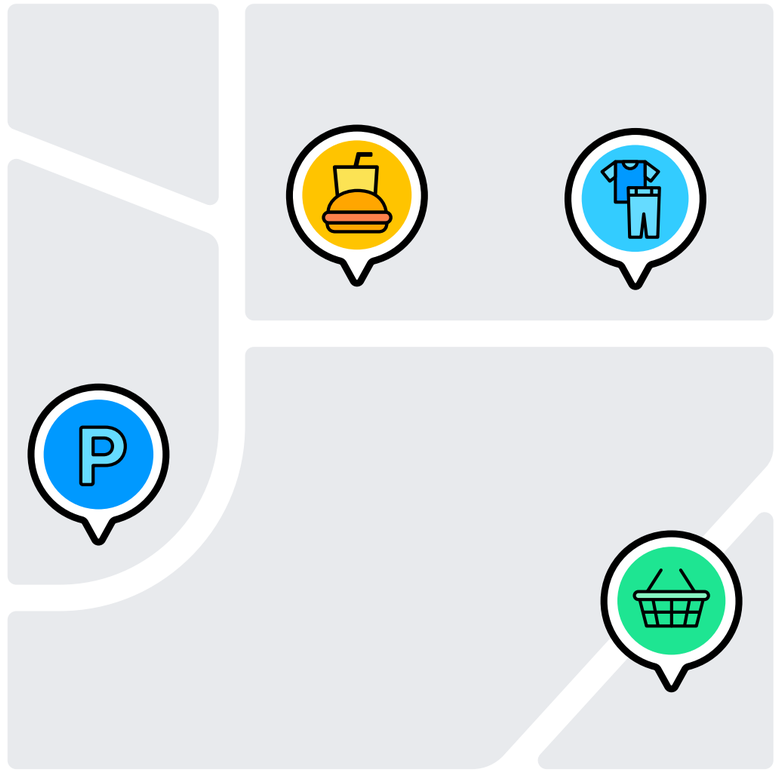
4

Despite liking to plan ahead, some drivers will still make decisions on-the-go and buy on the spur of the moment. This is particularly true for drivers that are under 34, and those with children.

Advertising can influence drivers' purchasing

Some drivers are open to suggestions while on the move. For example, a quarter would change their choice of retailer *while driving* if they saw or heard an advert for another retailer that interested them. Around one in seven have *actually stopped and bought something* while driving because of an advert they heard or saw while in the car.

5



The drivers of today exhibit a range of behaviours, personalities and purchasing traits. And this makes it all the more crucial to delve deeper into their influences and their motivations – so we can better understand how they are making decisions on the move.

Section One

Portrait of the UK driver

If you are a UK driver* today, the chances are you are also a frequent driver.

Twenty-eight percent use their cars on a daily basis, while 74% of drivers say they drive at least 3-4 days a week. Nine in 10 (92%) drive their cars at least once a week.

But it's also important to recognise the post-pandemic context that those figures come from. In short, we wanted to know if drivers, and driving, have changed.

One thing is clear – the car is still seen as an essential. Nine in 10 (88%) drivers say that the importance of being able to drive has stayed the same or is more important now than it was before the COVID-19 pandemic. This is supported by others too, with the RAC saying that more drivers than ever now claim they would struggle without a car.[4]

*See the methodology to learn how we define a UK driver for the purposes of this research

28%

use their cars on a daily basis

74%

of drivers say they drive at least 3-4 days a week

9 in 10

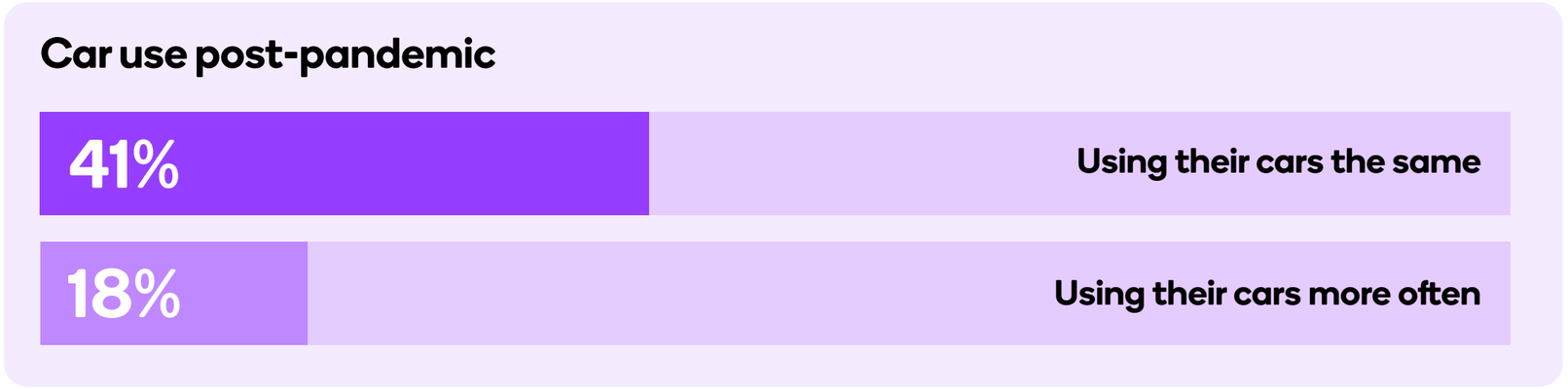
drive their cars at least once a week.

Two-fifths of drivers (41%) are using their cars to the same extent as they were before the pandemic, and 18% are using them more often. But there are demographic factors at play too.

There is a clear split in who is driving more often, embarking on more longer journeys and seeing an increase in total mileage, and it's one that indicates the value of driving for younger people (especially those that are under 35), those who are working, and those who have children in the household.

In contrast, those that are aged 45 and over are more likely to report decreases in driving frequency, journey length and total mileage compared to before the COVID-19 pandemic.

Car use post-pandemic



“Global crises have caused surges in costs of energy and fuel this year, but we continue to see car journeys increase across the country. Navigations are trending upwards across all commercial categories, driven kilometres are far exceeding pre-COVID-19 levels by 61% (vs Jan-Apr 2019), and summer hasn’t even begun yet. But what comes with this is an opportunity for Waze to keep cars moving freely, and for brands to reach drivers at exactly the right part of their day.”

Ruairidh Roberts

Country Manager, Waze UK

Waze knows
Waze UK users are more likely to be driving more

Driver behaviour in last 6 months compared to before the pandemic

	Waze UK drivers	All UK drivers
Driving more often[i]	23%	18%
Driving longer distances more often[ii]	22%	15%
Driving more miles[iii]	25%	18%
Saying driving a car is more important[iv]	32%	27%

Waze UK drivers are more likely to be

- Under 34
- Income £55k+
- Living in London and the South East

i Over the past 6 months, have you generally been using your car or van more often or less often than compared to the 6 months before the pandemic, or has it stayed about the same?

ii Over the past 6 months, have you been using your car or van to make long distance journeys more often or less often than you did before the pandemic, or has it stayed about the same?

iii Over the past 6 months would you say your total mileage has increased or decreased compared to the 6 months before the pandemic, or has it stayed about the same?

iv Compared to before the pandemic, would you say that being able to drive a car or van is more important or less important to you now, or has it stayed about the same?

Section Two

How are UK drivers using their cars?

Drivers adopt multiple personas when in their cars.

Yet some are more common than others, and there are geographical and demographic variations to consider too. Want to understand more? Check out these key driving behaviours.

Grocery shoppers

Drivers that use their cars to go shopping for groceries

89% of all drivers

87% of Waze drivers

Demographic where proportion is highest: ages 25-34

Locations where proportions are highest: Yorkshire and Humberside; Wales; Scotland

Visitors

Drivers that use their car to visit friends or family

83% of all drivers

85% of Waze drivers

Demographic where proportion is highest: ages 25-34, households with children

Locations where proportions are highest: North East; North West; Wales

Erranders

Drivers who drive on errands for family, relatives, or themselves

78% of all drivers

82% of Waze drivers

Demographic where proportion is highest: aged under 44, households with children

Locations where proportions are highest: North East; North West; East of England; Wales; Scotland; Northern Ireland

High street /shopping centre shoppers

Drivers who use their cars to go to the high street or shopping centre

68% of all drivers

71% of Waze drivers

Demographic where proportion is highest: ages 25-34

Income range where proportion is highest: £35-54k

Locations where proportions are highest: North West; Wales; Scotland; Northern Ireland

Sightseers

Drivers who use their car to drive to places of interest in the UK

62% of all drivers

74% of Waze drivers

Demographic where proportion is highest: ages 25-44, households with children

Income range where proportion is highest: £35k+

Commuters

Drivers who use their cars regularly to drive to or from their place of work

53% of all drivers

61% of Waze drivers

Demographic where proportion is highest: aged under 55, especially under 45, households with children

Income range where proportion is highest: £20k+

Locations where proportions are highest: West Midlands; Northern Ireland

Staycationers

Drivers who drive to or from a destination when taking a holiday or weekend break in the UK

49% of all drivers

53% of Waze drivers

Demographic where proportion is highest: ages 25-34, households with children

Income range where proportion is highest: £55k+

Locations where proportions are highest: North East; Midlands; Wales

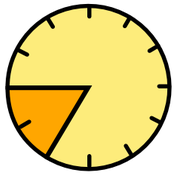
Waze knows
Where and when Waze UK users are travelling

Waze UK users are getting out and about

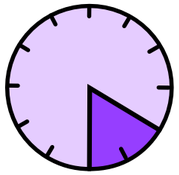
Our own insights reveal some notable driving behaviours, trends and preferences among our users.

Waze UK users are battling rush hour

Highest % of navigations on weekdays



7-9am



4-6pm

11am-4pm

But we are seeing real increases in daytime driving

29% of navigations (Jan-Apr 2019)
32% of navigations (Jan-Apr 2022)

Waze UK users are driving their cars to satisfy their shopping needs and hunger pangs

34% of all UK navigations are to retailers and quick service restaurants

Most popular work days for Waze UK users

Tuesday and Wednesday

highest % of navigations to work

Most popular destinations during summer holidays

Cornwall, Devon, Dorset, Cumbria and West Sussex

Most popular navigation in 2022 to date

Source: Waze UK data. Total navigations 2021 and Jan – Apr 2022

“Before the pandemic, traffic patterns were typical of the 9–5 working week. We’d see spikes in the morning as people drove to work, which would plateau throughout the day and increase during the evening commute. COVID-19 created new hybrid working styles, so while rush hour is still the most popular time to drive, we’re now seeing a notable increase in daytime trips too. This creates more opportunity than ever for advertisers to reach consumers in the car, targeting them while they’re on the move with messaging relevant to their journey.”

Mike Jolly

Head of Measurement & Insights, Waze

Section Three

Purchasing behaviour: four key traits among UK drivers

There’s not a one-size-fits-all when it comes to the purchasing behaviours of UK drivers. Four character traits have been identified that have significant relevance for advertisers.

1 Most drivers like to buy in-person

For many people, the car is still heavily integrated into their shopping behaviours despite the growth in e-commerce. Other than for white goods, drivers show a clear preference for buying in-person in all categories we surveyed. In some, the gap between preferring driving to the shop and other options is quite large, whereas for other categories it is much closer. But overall, the message is clear: UK drivers would rather drive to the shops than buy online.

Category	Prefer to drive to the shop	Go to the shop using public transport	Buy online for collection at shop	Prefer to buy online for home delivery
Groceries	68%	9%	≤ 5%	17%
Toiletries/Healthcare	64%	11%	≤ 5%	18%
Clothes	50%	10%	≤ 5%	32%
Furniture	48%	9%	≤ 5%	34%
Home accessories	47%	8%	≤ 5%	36%
Fast food*	39%	6%	≤ 5%	21%
White goods	35%	9%	≤ 5%	49%

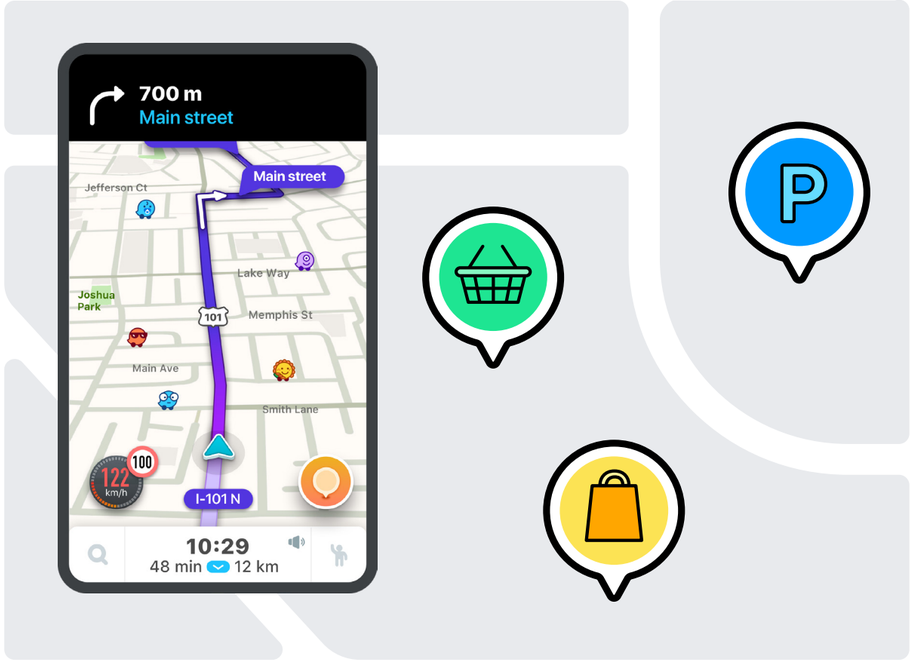
*26% of drivers say they wouldn’t buy fast food at all

2 Many drivers will seek out a good deal

The desire to drive may partly be because drivers are keen to search out the best value – a significant number of drivers are deal hunters and would drive further as a result. For example, 76% agree that they would drive past a petrol station and go further to another one if they knew they could get cheaper fuel (36% strongly agree). It's a classic trade off – cost vs convenience. Similarly, half (48%) agree that they would drive to a discount store to buy a product, even if there were stores selling similar products closer to their homes. And 59% of drivers agree they would be more likely to drive to a retailer if they knew it had a sale on.

3 Most drivers like to plan ahead

Drivers also like to pre-plan their shopping. Two-thirds (65%) agree that they always do so for any purchases, while 84% said that the last time they drove somewhere and bought groceries they had set out with a specific plan to do so. And eight in 10 (78%) will always pre-plan their shopping destination before they drive. What's interesting is that a notable proportion will also stop en-route to make a planned purchase. Around a third of Sightseers (33%) and Staycationers (36%) sometimes do so when driving to visit places of interest, on holidays or on weekend breaks in the UK – perhaps a reflection of the longer journeys. But similarly, a third of commuters (34%) will sometimes do so when driving to work too.



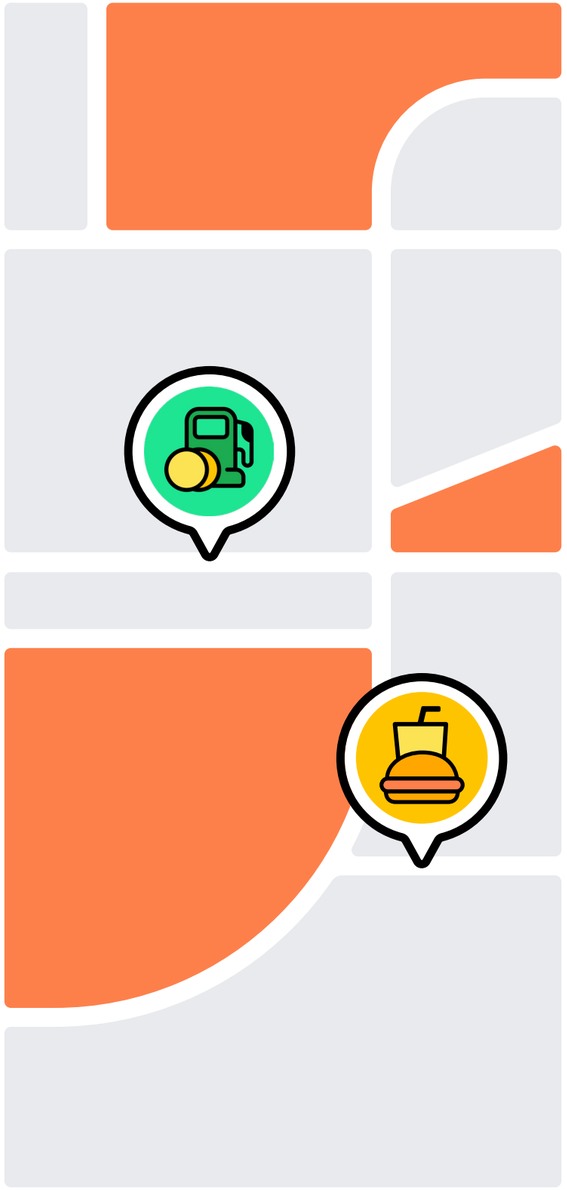
8 in 10

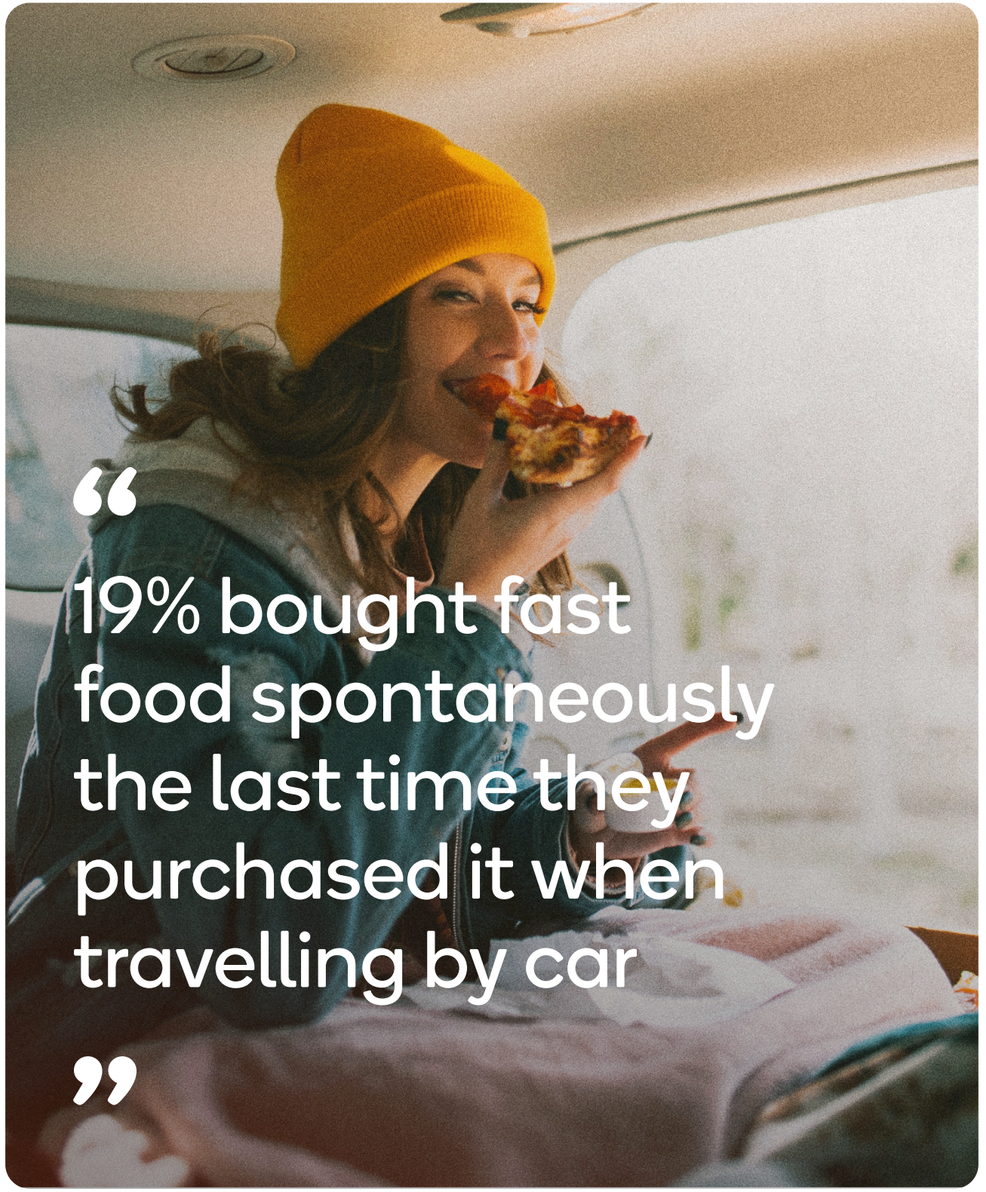
will always pre-plan their shopping destination before they drive

4 Some drivers will buy on impulse

Some drivers – particularly those under 34, and those with children – will make purchases on the spur of the moment. For example, when considering the last time they travelled somewhere by car and bought clothes, 20% of respondents said they had made the purchase spontaneously. Similarly, 19% bought fast food spontaneously the last time they purchased it when travelling by car, and 18% bought fuel on the spur of the moment the last time they filled up.

And when considering longer journeys, around 4 in 10 Sightseers (38%) and Staycationers (38%) sometimes make spontaneous purchases when driving to these destinations. One in five Commuters (20%) also do this when commuting to or from work.





“Our research has unearthed new insights about driver purchasing decisions. We now know that drivers are willing to make longer journeys for better promotional deals with more spontaneous decisions enroute. Advertisers can use these insights to improve their understanding of drivers’ motivations and capture spending potential at its most optimum.”

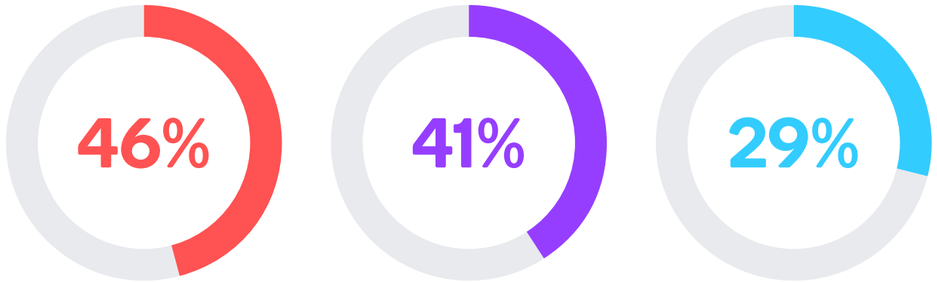
Ruairidh Roberts

Country Manager, Waze UK

Waze knows
Waze UK users are more spontaneous purchasers

Waze UK users make decisions on the spur of the moment

% of Waze UK drivers who sometimes make spontaneous purchases during these journeys*



Staycationers | Sightseers | Commuters

*While not a statistically significant difference compared with drivers in general (due to the sample size), these results suggest that Waze UK drivers could be more likely to make spontaneous purchases across each of these three personas.

% of drivers who bought these items spontaneously the last time they purchased them when travelling by car

	Waze UK drivers	All UK drivers
Clothes	28%	20%
Fast food	28%	19%

Section Four

The power of advertising on driver purchase behaviour

Reaching – and being able to influence – potential customers when they are already on their way to make a purchase is a sweet spot for advertisers.

The challenge is understanding their on-the-move behaviour – and finding ways to reach them in the moment.

We already know that advertising to an out-of-home audience can be incredibly effective. Research shows, for example, that consumers who see out-of-home advertising are more likely to make an online purchase from the brand.[5]

This suggests that drivers on-the-move are a fruitful market for advertisers to target.

*Includes shopping for fuel, groceries, clothes, healthcare, toiletries and fast food.

A quarter (25%) of drivers who have travelled by car and bought something* agree that they would be more likely to choose to drive to a retailer if they had recently seen or heard them being advertised. But more specifically, a similar proportion (24%) agree that they would change their choice of retailer *while driving* if they saw or heard an advertisement for another one that interested them.

And around one in seven drivers (14%) have actually stopped and bought something because of an advert they saw or heard while driving. Those that are under 34, working, with children, and/or living in London or Scotland, are more likely than other groups to mention having done this.

> “24% agree that they would change their choice of retailer while driving if they saw or heard an advertisement for another one that interested them.”

Meanwhile, a similar proportion of drivers (13%) have changed their route to make an unplanned stop to visit somewhere because of an advert they saw or heard while driving.

All of this indicates that a significant number of drivers are open to influence, and prepared to take an immediate action, while in the car and on the move.

“A huge priority for our media strategy at M&S is driving footfall into our stores, and we recognise that reaching people on the go is an extremely effective tool to achieve this. Platforms such as Waze offer us unique navigation inventory and valuable intent signals about where consumers are going. These signals coupled with the time of day, type of trip and even weather conditions enable us to better understand consumers’ mindsets and serve real-time contextual messages during their journeys.”

Katy Allison

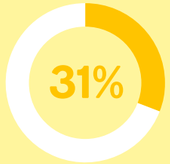
Media Strategy Manager,
Marks & Spencer – Food

Waze knows
Waze UK users are more receptive to advertising

Waze UK users are willing to listen

When considering drivers that have travelled by car or van and bought items, those using the Waze app are more receptive to advertising than drivers in general.

% more likely to choose to drive to a retailer if they had recently seen or heard them being advertised



Waze UK app drivers

All UK drivers

17% of Waze UK app users who use their cars regularly have stopped and bought something because of an ad they saw or heard while driving (vs 14% for all UK drivers)

18% of Waze UK app users who use their cars regularly have changed their route because of an ad they have seen or heard while driving in order to make an unplanned stop to visit somewhere (vs 13% for all UK drivers)

* Source: Waze UK data based on campaign sample of 1,934 from Jan 2020 – May 2022. Comparison of campaign level results between an exposed group of UK Waze app users vs a control group measuring the incremental navigation lift resulting directly from exposure to an ad.

Internal Waze UK data* shows that users exposed to Waze Ads in the following sectors increase navigation to the advertised location / business by:

80%
Auto

64%
QSR

21%
Retail

9%
Fuel

Section Five

How navigation apps are influencing purchasing behaviour

Drivers are using navigation apps for more than just navigation, and the intersection between this kind of technology and purchasing behaviour is fascinating.

It's clear that journey planning is a key objective behind the use of navigation apps. Sixty-one percent of drivers using them do so to find out how long a journey will take. The same proportion use navigation apps to plan their route before setting off, and 59% use them to find a specific destination.

But drivers are also using them for guidance in areas beyond the journey itself. One way navigation apps are used is for assistance when they reach their destination. For example, around a fifth of users will use them to search for businesses, retailers, or services in a specific area.

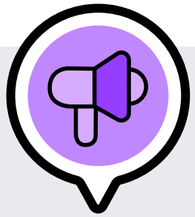
And it's because of this extended reach that navigation apps can exert a powerful influence on consumer behaviour. This can be seen in the effect that advertising on these platforms is having. For instance, of those drivers that have seen adverts on navigation apps (12% of those who use phone-based navigation apps), almost a quarter (23%) have changed their route to visit a place that had been advertised. A similar proportion (22%) have visited locations they would not have previously considered, and one in five (20%) have changed their mind in terms of their final destination as a result of an advert they had seen.

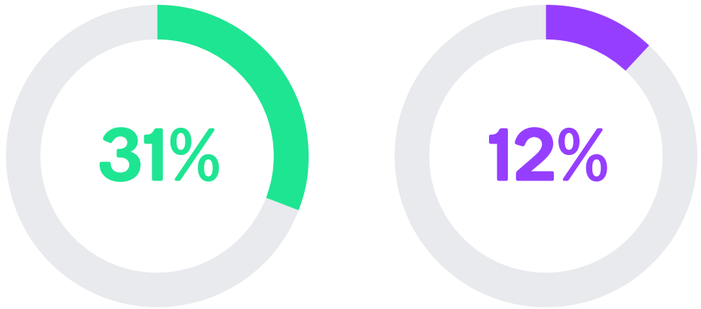
“It's because of this extended reach that navigation apps can exert a powerful influence on consumer behaviour”

Waze knows
Waze UK app users notice in-app advertising

Waze UK users are paying attention

% who say they have seen advertising within the app



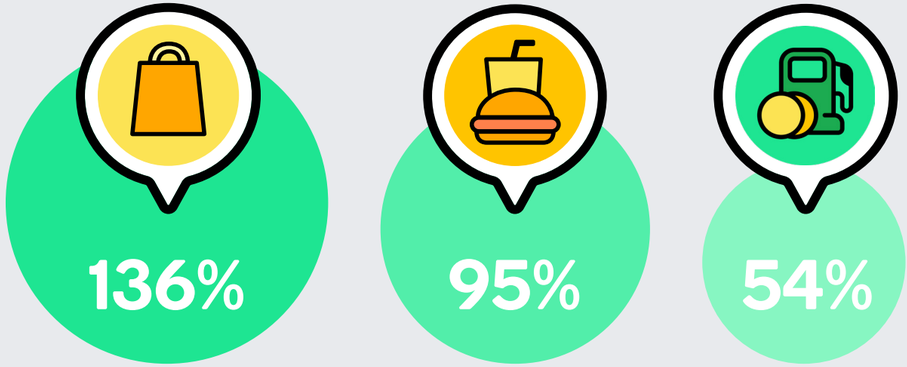


21%

of navigation app users use them to search for businesses, retailers, or services.

* Source: Waze UK data based on campaign samples Jan 2020 – May 2022. Percentage increase in ad recall for users directly exposed to advertising for that brand on Waze, compared to a non-exposed control group.

Internal Waze UK data* shows that increases in ad recall due to direct exposure to ads on Waze in the following sectors were:



Section Six

What does this mean for advertisers?

The report has unveiled some fascinating insights into UK drivers. To help draw it all together, here are our top five takeaways for advertisers:

The car is an essential purchase enabler

1

This can be seen by almost nine in 10 drivers using the car for everyday essentials such as groceries, as well as in the preference rates for driving to the shops over e-commerce purchases. For many, the car and the purchase go hand-in-hand.

Understanding driver mindsets is key

2

To successfully capture attention, advertisers need to understand the behavioural traits of UK drivers and how they impact their destination decisions and purchasing preferences.

Top five takeaways for advertisers (continued)

There are multiple opportunities to influence drivers

3

With many planning destinations and purchases in advance, along with significant numbers buying on the spur-of-the-moment, there are several points in which drivers' attention could be captured.

In-car advertising drives purchases

4

In both theory and practice, UK drivers say that in-car ads can determine a purchase. That shows that on-the-move consumers are a ripe market segment – advertisers should consider how to target them best.

Navigation apps have a wider influence beyond route-finding

5

They don't just help drivers get to their destination, they also help them to decide where to go and what to do when they get there. And that makes them powerful tools for advertisers to harness.

Above and beyond these findings though, it's clear that drivers are not just people making a journey. In any one moment they could also be potential consumers that are open to influence. And that means there's an unmistakable opportunity for those that can target them effectively.

There's a wealth of valuable data and insight that can help advertisers understand UK driver behaviours today. Want to learn how to access it?

Methodology / Sources

Methodology

Ipsos conducted an online survey in March 2022, among a representative quota sample of 4,378 adults in the UK aged 18 to 75, screening for those who have a full UK driving licence or foreign licence that is valid in the UK, and who own, lease or have main use of at least one car or van, who have driven in the last six months, and do not drive as a profession. Of the total sample, 2,748 participants qualified to answer the full survey. These 'drivers' are whom we refer to throughout this report, unless otherwise stated.

Sources

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