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2026 Path to Purchase Report

From Clicks to Keys: Navigating the Evolving Car Purchase Journey

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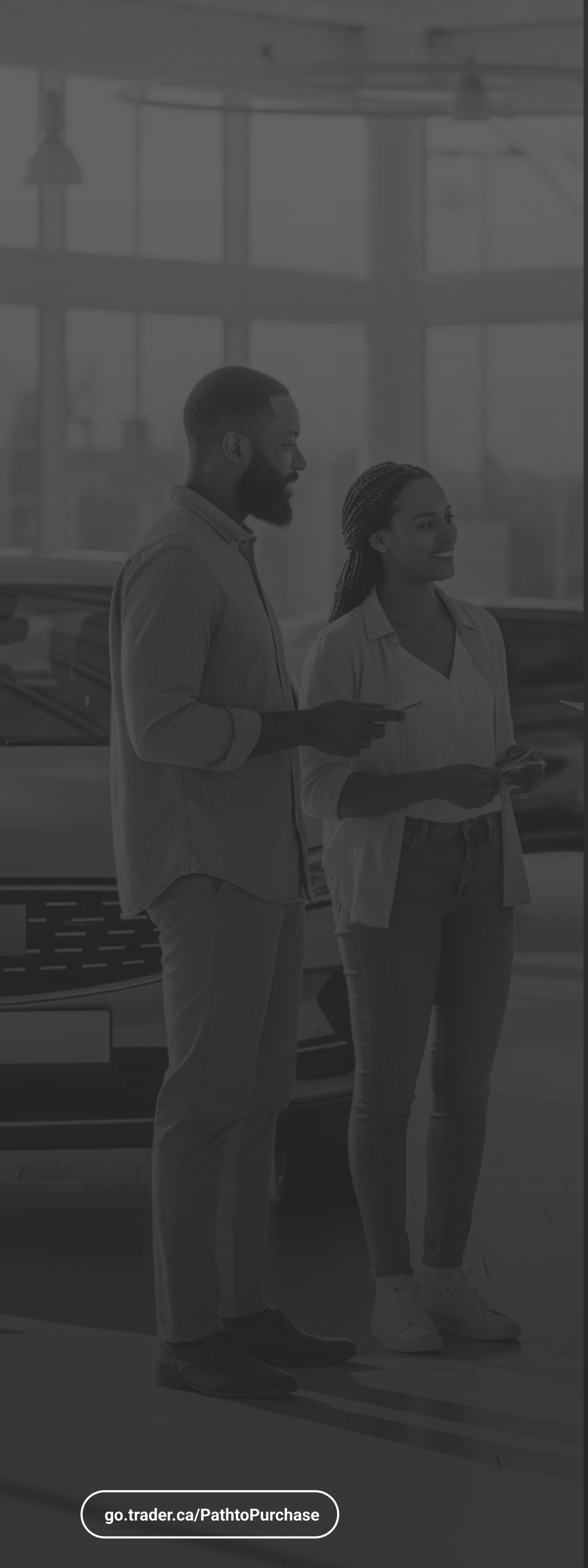

About the Study

Since 2019, AutoTrader has conducted ongoing consumer research to better understand how Canadians navigate the car buying journey. As consumer behaviours, expectations and purchase decisions continue to evolve, understanding what influences shoppers has become increasingly important.

The 2026 Path to Purchase Study takes a closer look at how Canadians research, compare and ultimately purchase vehicles, identifying shifts in shopper behaviour, key decision-making factors and the touchpoints that influence their journey.

For dealerships, these insights provide an opportunity to better anticipate shopper needs, strengthen customer engagement and identify ways to turn purchase intent into sales.

Methodology

Sample size:
1,727 Canadians

Age:
17–74

Audience segments:
Past 6-month vehicle purchasers (n=758)
Next 6-month purchase intenders (n=597)
Non-purchasers / intenders (n=327)

Fieldwork:
August 2026

Data was weighted within each sample group to ensure representation of the Canadian population

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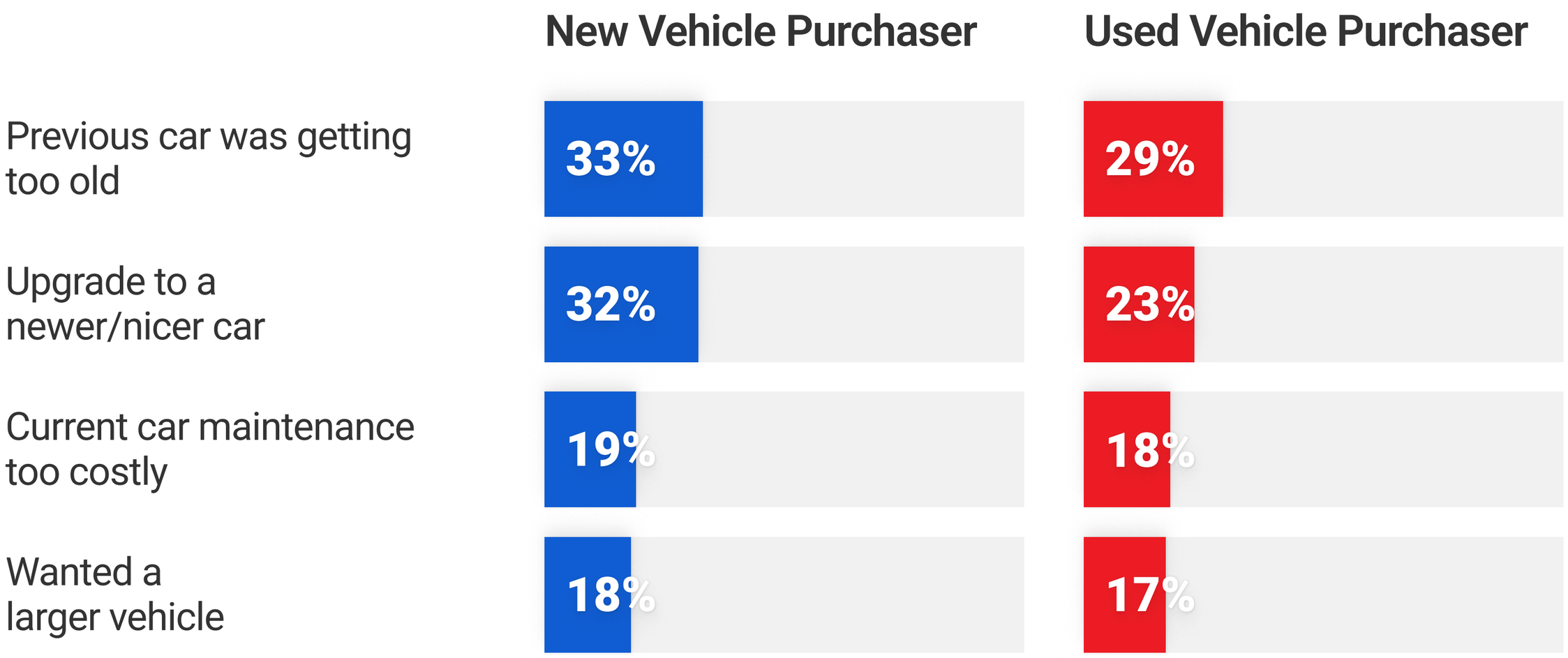
What Prompts Shoppers to Buy



The Dealer Opportunity

Understanding what drives consumers to purchase a vehicle can help you identify opportunities to turn shopper interest into sales. By recognizing these motivations you can better position inventory, tailor your sales approach and address shopper needs to help drive stronger conversions and begin building trust with shoppers from the start.

Purchase Journey Duration

3 Months

Battery Electric Shoppers

(3.7 vs. 2.8 months for ICE)

Luxury Purchasers

(3.5 vs. 2.8 months for mainstream)

AI Users

(3.4 vs. 2.9 months for non-users)

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Online is the Top Source in the Car Shopping Journey

New Vehicle Purchaser		Used Vehicle Purchaser
82%	**Online**	86%
50%	Visited online automotive marketplace	79%
46%	Visited dealership website	31%
40%	Visited manufacturer websites	18%
24%	Used an AI tool or AI-powered assistant	26%
73%	**Dealership In-Person**	49%
59%	Visited dealership in person *(with test drive)*	36%
26%	Visited dealership in person *(no test drive)*	19%
3.5	**Average Number of Steps**	**3.3**

The Dealer Opportunity

Identify the touch points that matter most by recognizing how new and used vehicle buyers navigate online and in-person channels. You can prioritize your marketing investments, strengthen their presence at key decision-making moments and create more opportunities to convert shoppers into customers.

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Consumers Consider Multiple Makes & Dealerships

Number of makes considered

New 2.9 average

Used 3.2 average

Number of dealerships visited

New 1.9 average

Used 1.7 average

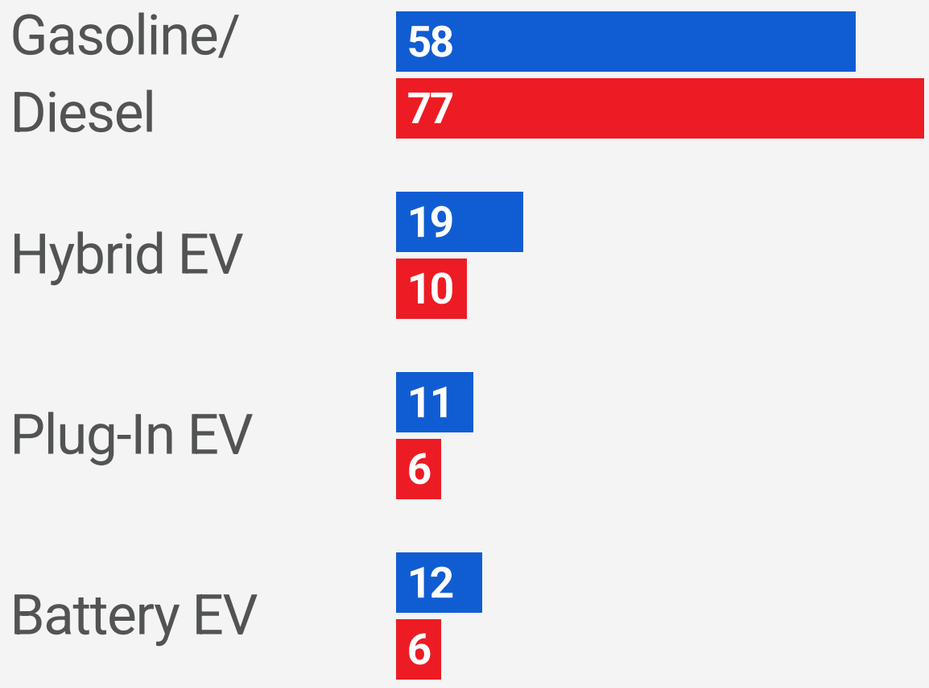
Primary Place of Purchase for Used Buyers

34% Independent dealer

30% Franchised dealer

27% Private seller

Powertrain Mix





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Support Shoppers During Difficult Phases

Trust & Value

New Vehicle
56%

Used Vehicle
57%

Find getting a fair price for their old vehicle trade-in difficult

Other Difficulties:
- Feeling confident getting fair value
- Choosing a dealership
- Timely dealer response

Affordability & Cost

New Vehicle
38%

Used Vehicle
50%

Say comparing prices of different vehicles is difficult

Other Difficulties:
- Setting a budget
- Estimating insurance needs
- Deciding how to pay (finance vs. lease)
- Loan pre-qualification

Choice & Comparison

New Vehicle
35%

Used Vehicle
42%

State deciding which options to add is difficult

Other Difficulties:
- Choosing vehicle type
- Choosing the trim
- Choosing the powertrain
- Deciding on brand

The Dealer Opportunity

Help shoppers overcome purchase barriers by simplifying and being transparent about pricing, trade-in values and vehicle comparisons. Providing personalized recommendations and guidance on their options can reduce uncertainty, build trust and help shoppers move confidently toward a purchase.

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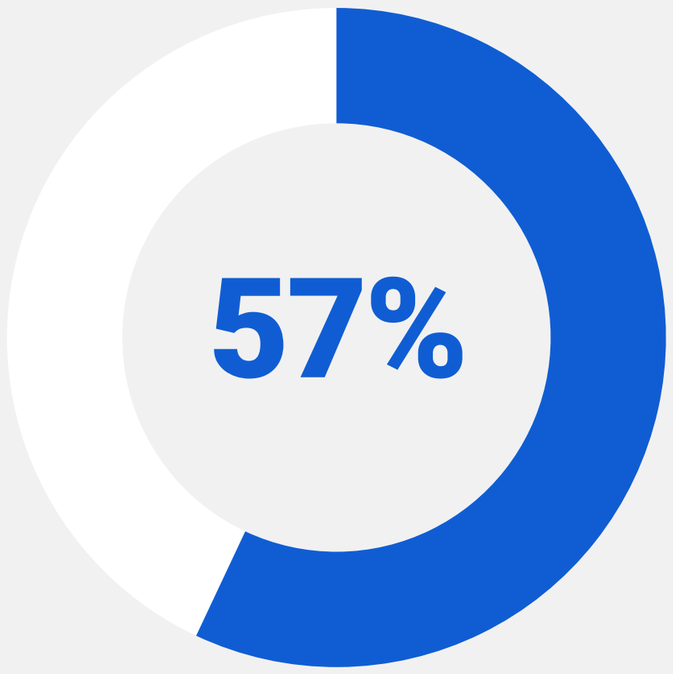
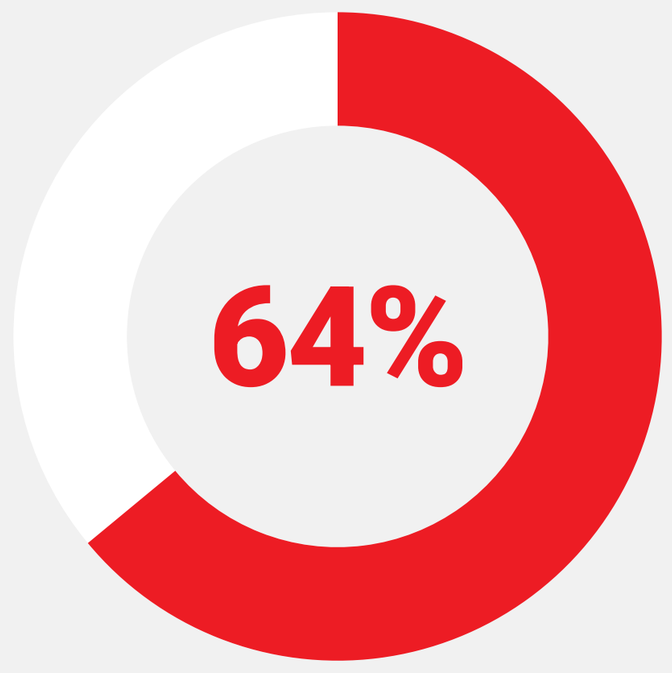
Price Triumphs the Decision Making Process, With Room for Influence



of new vehicle purchasers say
price is the top selection criteria

Focus: Vehicle Details & Specs

49% Brand Reputation
43% Fuel Type
42% Comfort
41% Body Type



of used vehicle purchasers say
price is the top selection criteria

Focus: Practicality

51% Kilometres on Vehicle
42% Vehicle Year
35% Vehicle History

58% of purchasers agree tariffs and trade policies impact when/what vehicle they purchase

The Dealer Opportunity

Price is the leading purchase consideration for both new and used vehicle buyers. Being transparent about pricing and clearly outlining your financing, sales or incentives, can help buyers feel more confident. Tailor your sales approach to what matters most to each buyer - highlight vehicle features and benefits for new shoppers, and emphasize value, condition and history for used shoppers.

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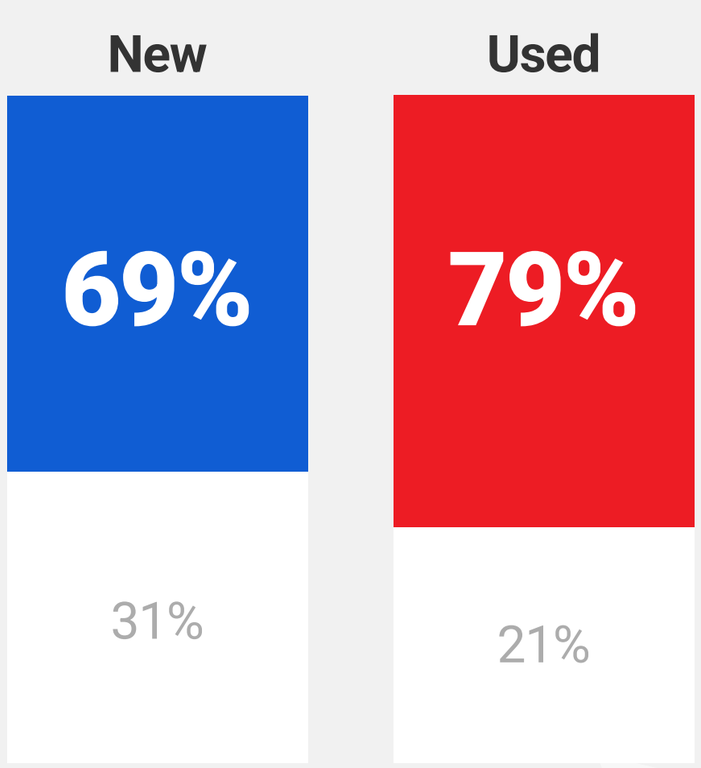
Shopper Intentions Are Not Set in Stone

Bought exactly what they initially intended



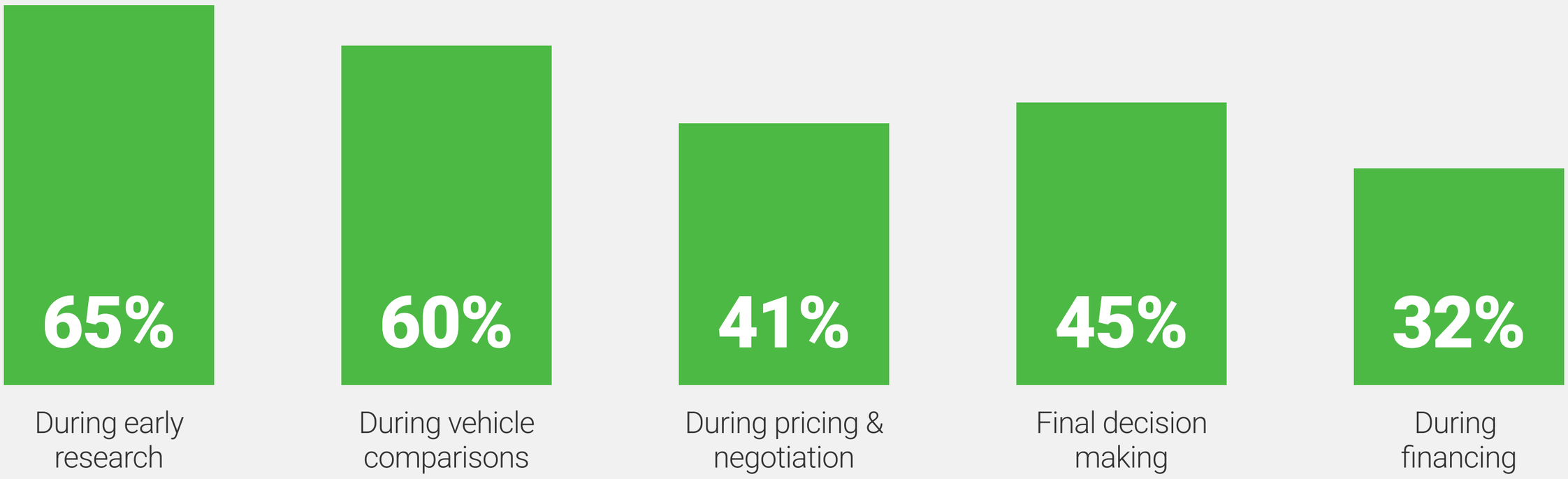
Where Plans Change

	New	Used
Budget	25%	36%
Power Type	22%	17%
Different Make	21%	20%
Timing of Purchase	19%	18%
New vs. Used Vehicle Decision	11%	16%
Trim Level	17%	11%

The Dealer Opportunity

Most car shoppers ultimately purchase something different from what they originally intended. Take the time to understand their evolving needs, address budget concerns and recommend relevant alternatives, to influence purchase decisions and create more opportunities to convert shoppers into buyers.

AI Is Leveraged Throughout the Shopper Journey



Consumers Continue to Rely on Dealerships for Support

52%
Confirming final price, fees, or incentives

47%
Getting a test drive or hands-on experience

43%
Understanding warranty, service, or maintenance considerations

41%
Confirming vehicle availability

38%
Assessing the condition or history of a specific used vehicle

37%
Comparing similar vehicles currently available

37%
Negotiating or finalizing the purchase

21%
Understanding financing, leasing, or payment options

The Dealer Opportunity

Shopper engagement with AI is highest during the early stages of the purchase journey, with renewed activity as buyers approach their final decision and increasingly turn to AI to validate their choices. For your dealership, this presents an opportunity to build relationships early and maintain trust through relevant information, timely support and consistent communication. As shoppers move closer to purchase, clear pricing, detailed vehicle information and hands-on experiences become increasingly important. By addressing these needs proactively, you can demonstrate credibility, reduce hesitation and help turn purchase intent into sales.

Shoppers Leverage AI As a Shopping Assistant, Not Just A Research Tool

Learn the Market
Compare brands, models, features and reliability

Build the Shortlist
Summarize listings, discover options, track prices, and availability

Validate Value
Better understand the vehicle trade-in value and helps find the best price

Structure the Deal
Compare purchase, payment and financing approach



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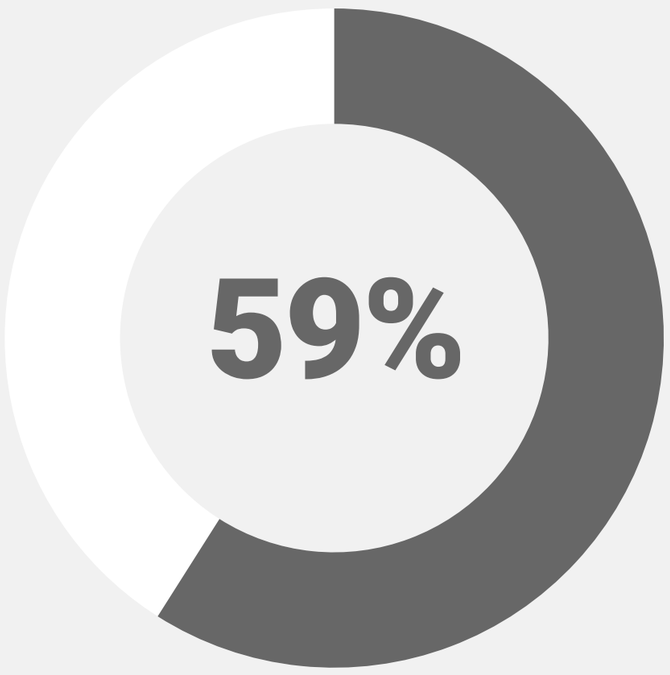
Support Shoppers During Unprecedented Times



of shoppers agree tariffs and trade policies impact when/what they purchase

Delayed the vehicle purchase

Spent more time price-comparison shopping

Considered a hybrid / electric vehicle instead of a gasoline / diesel

Reduced the purchase budget

Reconsidered buying a vehicle made/assembled in the US

Switched from considering a new vehicle to a used vehicle

The Dealer Opportunity

Trade tensions and tariff uncertainty are influencing vehicle purchase decisions. Help shoppers navigate economic uncertainty by emphasizing affordability, transparent pricing, vehicle value and explain any potentially impacts from tariffs. Offering flexible financing options and relevant inventory alternatives can help address purchase hesitation and keep shoppers moving toward a decision.

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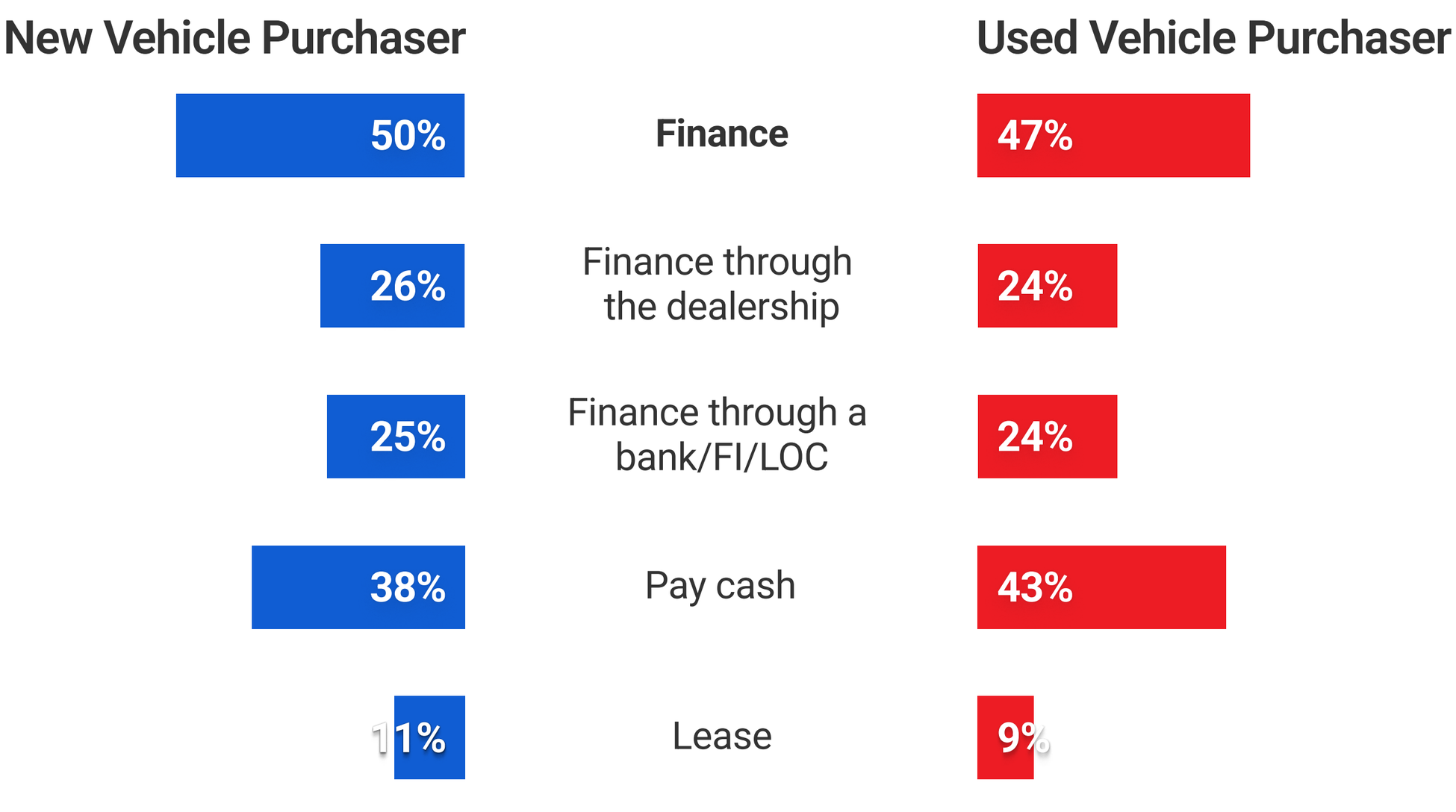
Be Transparent About Your Financing Options



The Dealer Opportunity

Offer flexible payment options and communicate financing opportunities clearly throughout the purchase journey. Understanding shopper's payment preferences early can help you address affordability concerns, tailor your sales approach and reduce barriers to purchase.

Used Vehicle Intenders Have Increased Budgets but Affordability Remains a Priority

$54.7K

New Vehicle Intenders
(vs. $55.6k for past 6 month shoppers)

$34.6K

Used Vehicle Intenders
(vs. $29.8k for past 6 month shoppers)

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Develop a Strong Post-Purchase Communication Strategy

88%

of new vehicle purchasers are interested in post-purchase communication

Top Preferences

Service / maintenance reminders (52%)
Ownership support (48%)
Specials on service, maintenance, parts (46%)
Tips/ information to get the most from your car (38%)
Lease-end / finance renewal reminders (26%)

75%

of used vehicle purchasers are interested in post-purchase communication

Top Preferences

Service / maintenance reminders (41%)
Specials on service, maintenance, parts (36%)
Ownership support (29%)
Specials on new / used vehicles (26%)
Trade-in or vehicle upgrade offers (26%)

The Dealer Opportunity

The customer relationship extends well beyond the vehicle purchase. Turn one-time purchases into long-term customer relationships through relevant and personalized follow-ups. Providing ongoing service reminders, ownership support and timely offers can strengthen loyalty, encourage repeat business and create additional revenue opportunities.

Develop a Strong Post-Purchase Communication Strategy

1 Be Visible Early in the Journey

Reach shoppers while they're actively researching and comparing vehicles to keep your dealership in consideration by meeting them where they are online.

2 Adapt to Changing Shopper Priorities

Understand evolving budgets and preferences, and recommend relevant inventory alternatives as purchase decisions take shape.

3 Build Confidence Through Transparency

Provide clear pricing, vehicle details and financing options to address uncertainty and help shoppers make informed decisions.

4 Adapt to the Rise of AI-Assisted Shopping

As more consumers turn to AI you have an opportunity to build trust through accurate, consistent information and transparent pricing. Ensure your listings are detailed and up to date, and be prepared to address questions or discrepancies shoppers may uncover through AI-powered research.

5 Make Every Interaction Count

Offer responsive, personalized support and opportunities to experience vehicles firsthand to help move shoppers toward purchase.

6 Extend the Relationship Beyond the Sale

Maintain engagement through relevant ownership communications, service reminders and ongoing support to encourage loyalty and repeat business.

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