



LATEST CONSUMER TRENDS & RESEARCH

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GM Auto OEM & MEDIA



CARSALES BREAKS RECORD AUDIENCE AGAIN

JUNE 2020 HIGHLIGHTS



RECORD AUDIENCE

4.9M UNIQUE AUDIENCE (UA)

visited carsales in June, **40% higher** than the same month in 2019.¹

RECORD SESSIONS

carsales served
34.3M SESSIONS
IN JUNE 2020,
up 40% on June 2019.¹

HIGH ENGAGEMENT

Visitors to carsales.com.au were also highly engaged in June, spending an average of
37 MINS ONSITE.¹

AUTO, LIFESTYLE + LEISURE

6.8M+
PEOPLE A MONTH¹

carsales

motoring
.com.au

Red
book

tyresales

boatsales

bikesales

caravancampingsales

constructionsales

trucksales

farmmachinerysales

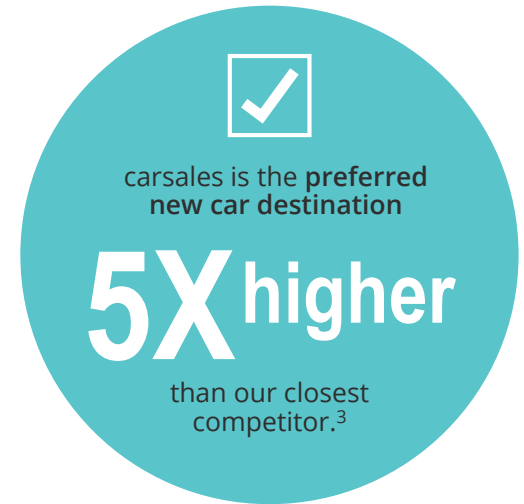
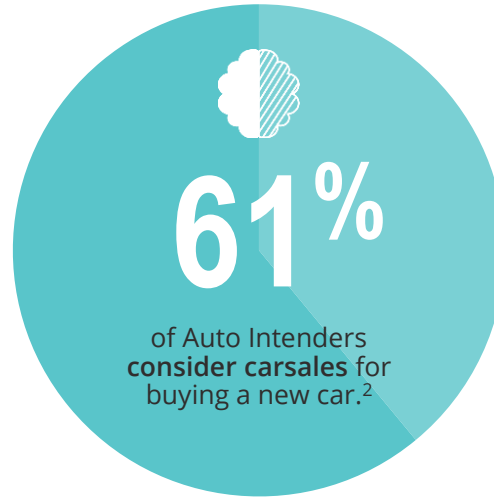
Carsales is undeniably a new car environment to the consumers & they are open to influence.

The latest trends are showing structural changes, with a new cohort of buyers.

New to market cohort is heavily engaging with online information.



CARSALES IS UNDENIABLY A NEW CAR ENVIRONMENT TO THE CONSUMER



Sources: ¹Nature research, January–March 2020, 'Which of these places/websites/apps have you heard of before today where people can buy new?' ²Nature research, January–March 2020, 'In future, which of the following best describes your consideration of the following for buying a new car?' ³Nature research, January–March 2020, 'You said you would go to the following for buying a new car. If you had to choose one tomorrow, which one would you most prefer?.'

GEARED UP FOR NEW CAR BUYERS

carsales provides the largest volume of new car inventory and features specifically tailored to help new car buyers.

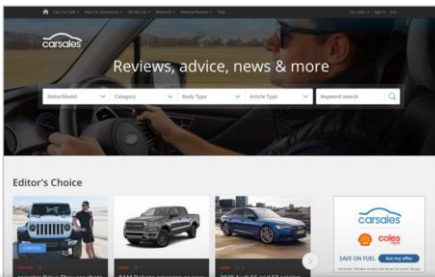
NEW CAR CONTENT

Over 300 stories and features are created every month by our trusted new car experts covering new car news, reviews, comparisons advice, and videos.

1.4M combined editorial audience generating...

2.5M+ sessions across Carsales Editorial in June¹

+ 70%
vs Apr20



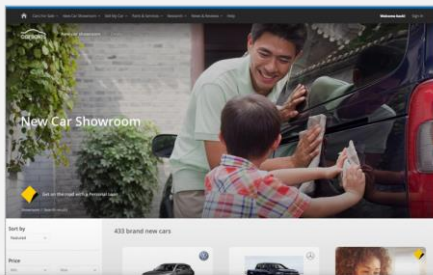
NEW CAR SHOWROOM

The New Car Showroom on carsales is dedicated to simplifying the journey to buy *new* cars. It enables car buyers to discover, search and compare every new car all from the one destination.

864k+

sessions on our New Car Showroom per month²

+ 34.8%
YOY



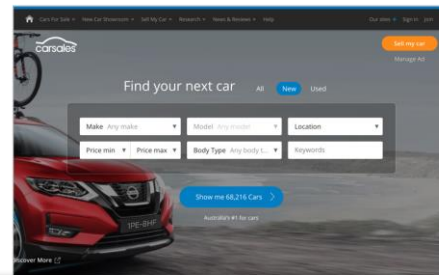
NEW CAR INVENTORY

From an inventory perspective, carsales is proportionally just as much new car focused as the broader industry. That is, 32% of all carsales listings are for new vehicles (or near new) vs 31% of industry sales are for new cars.³

21.9mil+

searches conducted across new and near new car listings²

+ 27.6%
YOY



IDENTIFYING A NEW CAR AUDIENCE

There are many ways carsales can identify potential new car customers.

BY AD TYPE

carsales is Australia's largest automotive network, listing over 205,000 vehicles nationally.¹ The search capability across our website allows users to filter their search criteria based on their needs.

Ad Type

- Brand new cars
- Dealer used cars
- Demo and near new cars
- Private seller cars

BY PRICE POINT

A key filter and criteria for purchase decision making is budget. Identifying audiences that are exploring vehicles in your model's price bracket is a simple way to eliminate irrelevant noise.

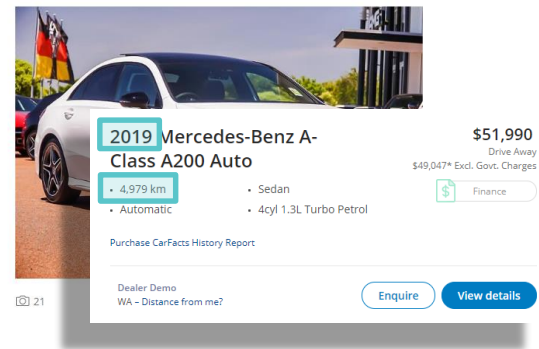
Price

From:

To:

BY AGE AND/OR KM'S

Our detailed search functionality enables users to sort and identify vehicles by key features, many of which may indicate a new car. For brands, this can help identify relevant audiences that would consider your offering.



Sources: ¹Average inventory from May 2019 – April 2020. Inventory comparison based on the last day of every month.

FOR MOST OF OUR AUDIENCE, A NEW CAR IS A CONSIDERATION

 BY AD TYPE

90.1%

of searches on carsales listings **don't specify** new or used vehicles, or they select **both** new *and* used.¹

 BY PRICE POINT

69.6%

of searches on carsales are on cars **priced \$15K or more** (equating to 47M+ searches p/month).²

 BY AGE AND/OR KM'S

47.2%

Of the users viewing used car details pages on carsales, of them were viewing vehicles 3 years old or less (2017+).³

OVER HALF OF CARSALES VISITORS ARE IN THE EARLY PHASES OF RESEARCH

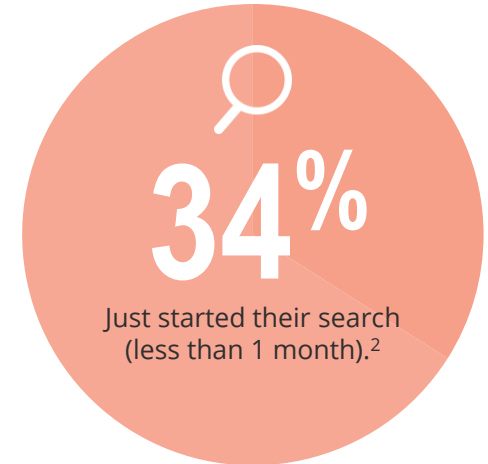


On average, the journey to vehicle ownership takes 2.7 months.¹ 34% of carsales' audience has just started their search (looking for less than 1 month) and a further 20% have been looking for a little over 1 month.² When specifically asked 'when they are looking to buy?', 43% have stated they are still at least 2 months from purchase.²

WHEN ARE YOU LOOKING TO BUY?



HOW LONG HAVE YOU BEEN LOOKING?



Sources: ¹IPSONS Journey to Vehicle Ownership, 2017. ²carsales website survey, October 2019. 'When are you looking to buy?' and 'How long have you been looking?'

OUR AUDIENCE IS OPEN TO INFLUENCE

Visitors to carsales are in the evaluation stage. They are undecided and open to influence, and are still very much looking to discover, research and compare different models and brands.



52.7% of our new car buyers who start their search looking for a specific make end up leaving a lead on a different one.¹



Users who knew what they wanted still considered 4 makes and 8 models.²



Car buyers spend an average of 38mins on site each month researching, comparing and building their shopping list of potential vehicles.



CONSUMER SENTIMENT

Survey 1: March 26-27 2020 (n= 1841)

Survey 2: April 1-2 2020 (n=1,717)

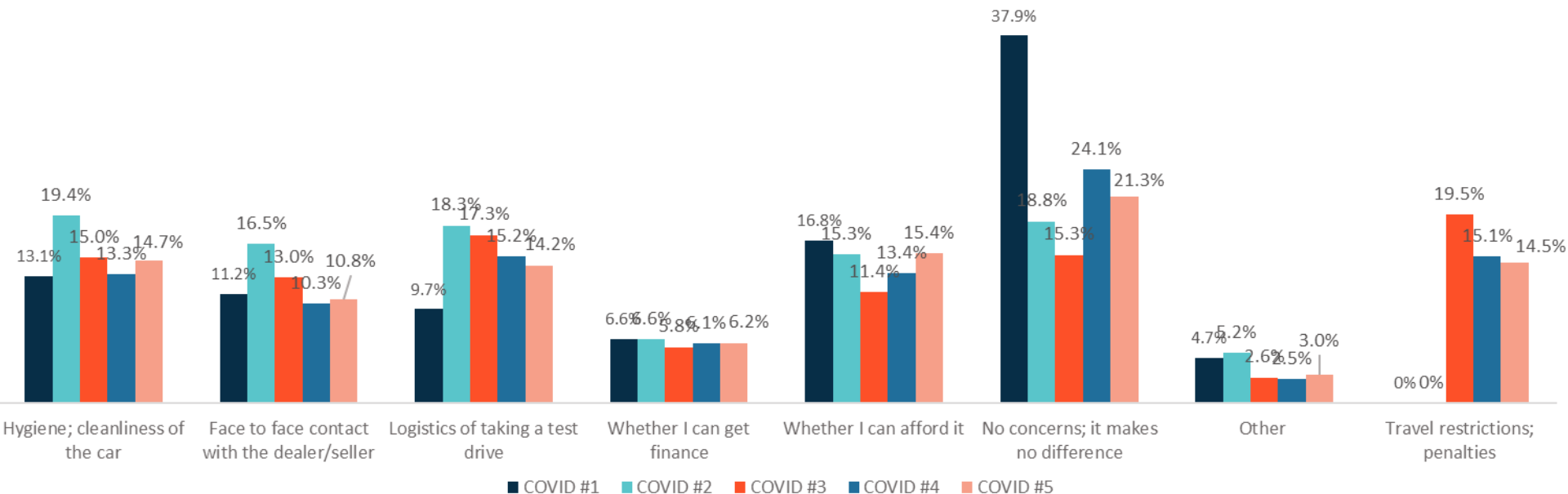
Survey 3: April 16-17 2020 (n=1,816)

Survey 4: May 1-3 2020 (n= 3,462)

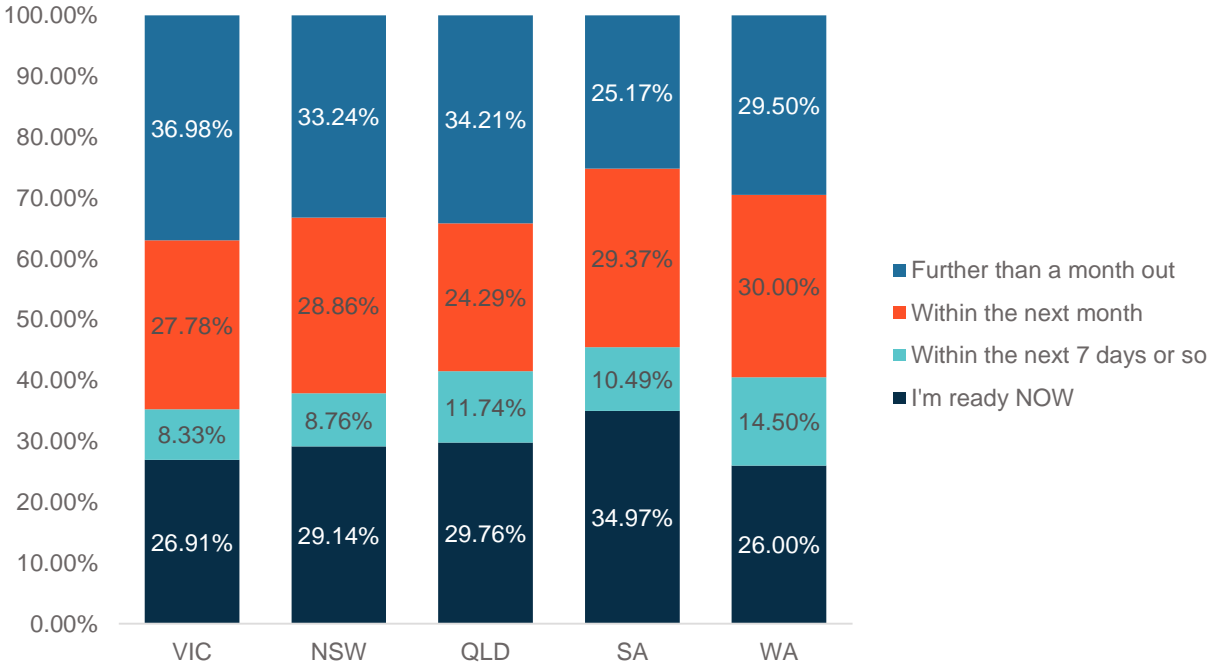
Survey 5: July 27-28 2020 (n=3,013)

CONSUMER SENTIMENT: BIGGEST CONCERN

Q: "What are your biggest concerns with buying a car in this COVID-19 climate?"



Q: "When are you looking to buy?"



Respondents from states where COVID restrictions are in place, have an extended purchase window.



BUYER INTENT SURVEYS

1: 4TH – 5TH MAY 2020. n=3,133

2: 22ND – 23RD JUNE 2020. n=3,089

3: 21ST – 23RD JULY 2020. n=3,508

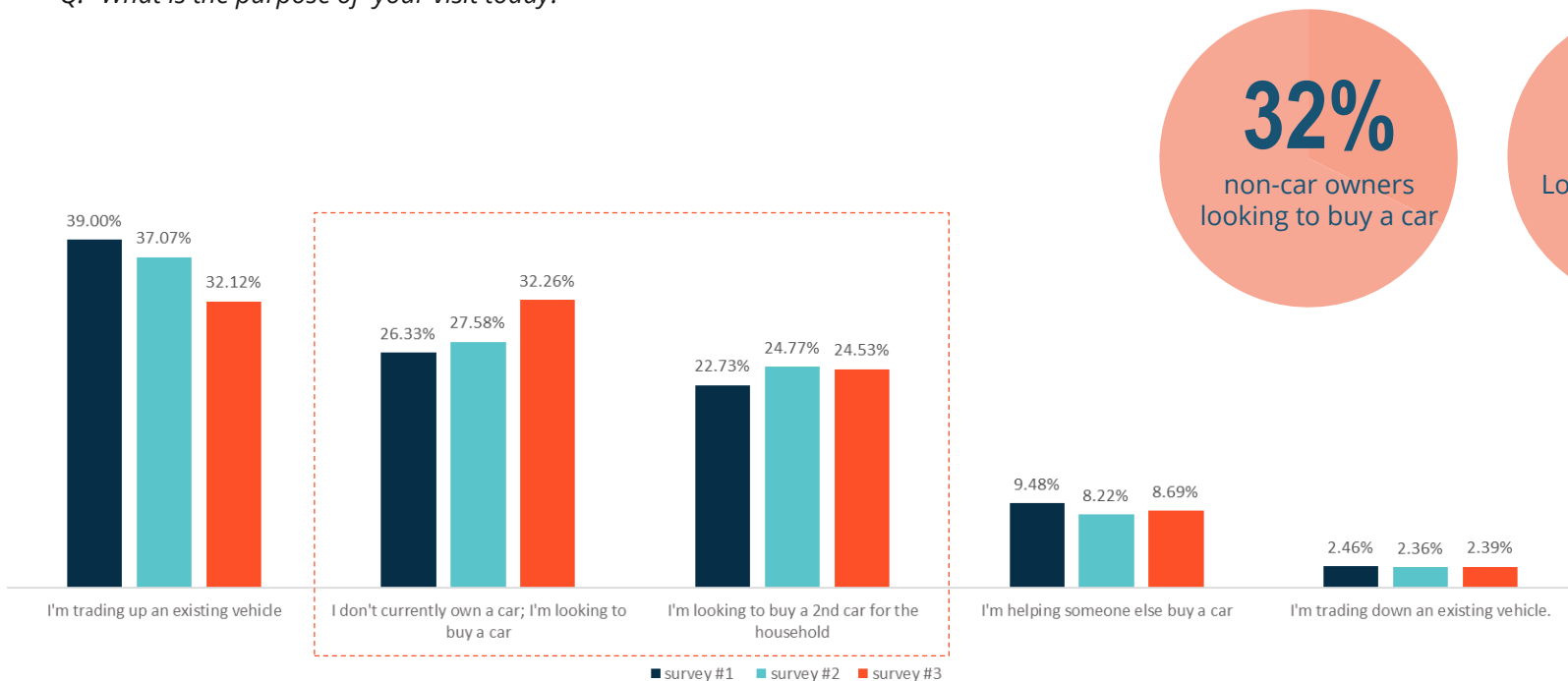
POST COVID TRANSPORTATION PREFERENCES

Survey 1: 18TH APRIL – 27TH APRIL 2020. n=2,983

Survey 2: 16TH JULY – 21ST JULY 2020. n=1,755

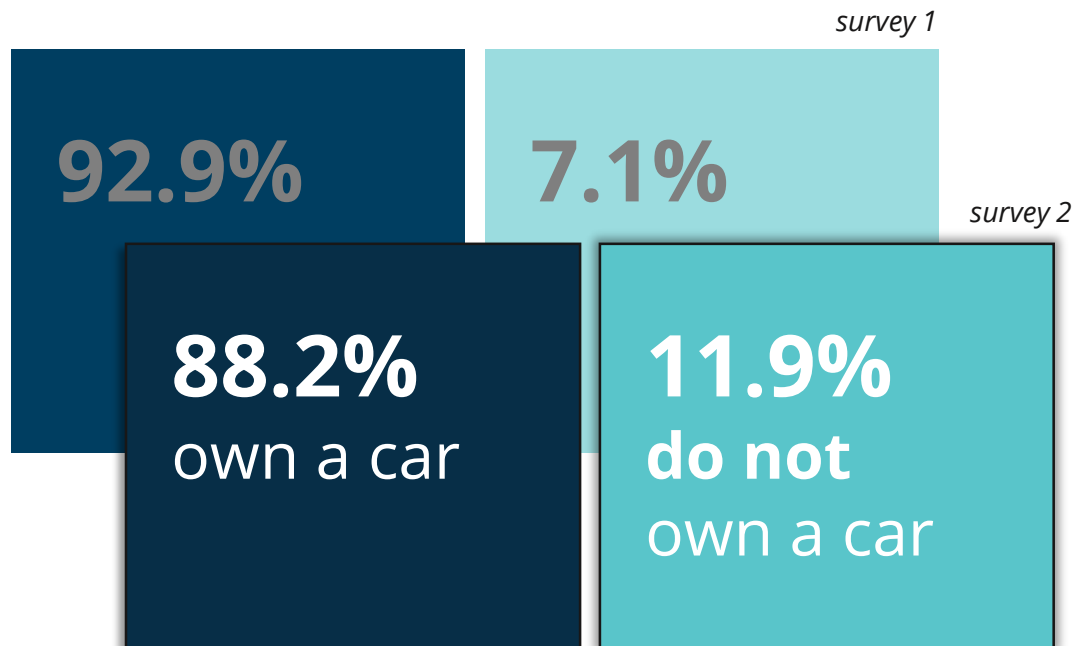
PURPOSE OF VISIT

Q: "What is the purpose of your visit today?"



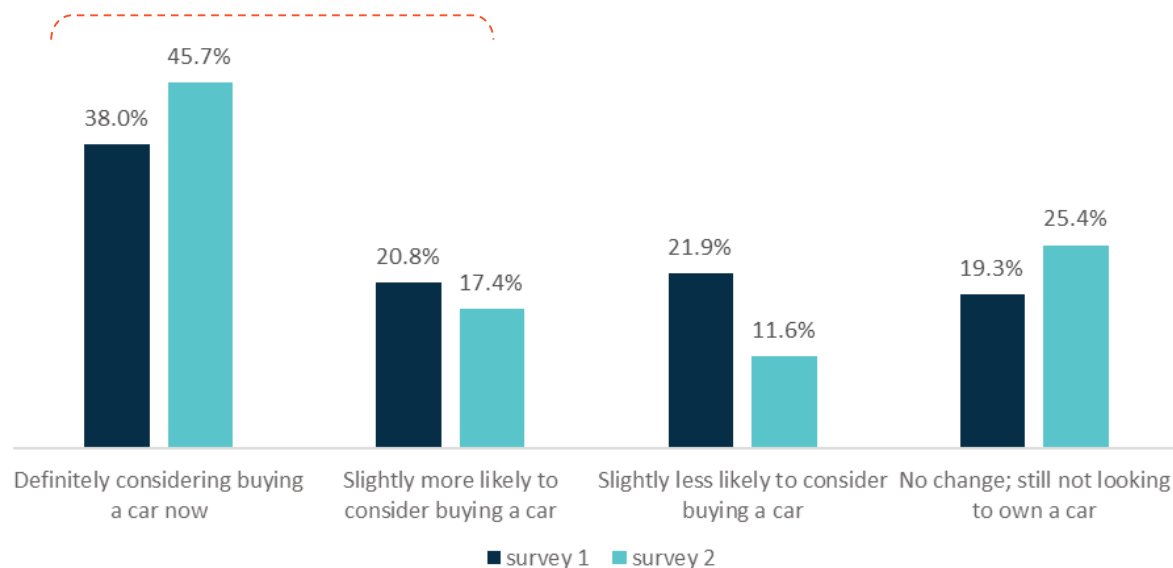
POST COVID TRANSPORTATION PREFERENCES

Q: "Do you currently own a car?"



NON CAR OWNERS: IMPACT OF COVID-19

Q: "Has COVID-19 had an impact on your intent to purchase a car?"



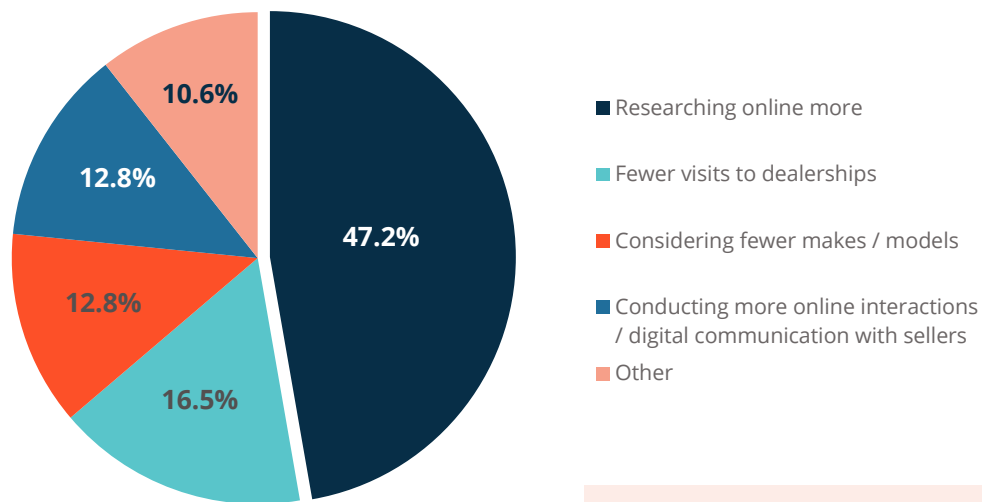
63% of non-car owners are **more likely to consider buying** a car now¹ with 34% stating an increase in urgency to do so.

¹Sum of definitely and slightly more likely to consider buying a car now

Source: Survey 1: carsales Post COVID transportation survey, April 18-27, 2020. n=2,983 (filtered by non car owners n=191), Survey 2: carsales Post COVID transportation follow up survey, July 16-21, 2020. n=1,755. (filtered by non car owners n=138)

NON CAR OWNERS RESEARCHING ONLINE MORE

Q: How has COVID-19 changed how you are shopping for your car?



Almost half of non-car owners are doing **more online research** as a result of COVID-19.

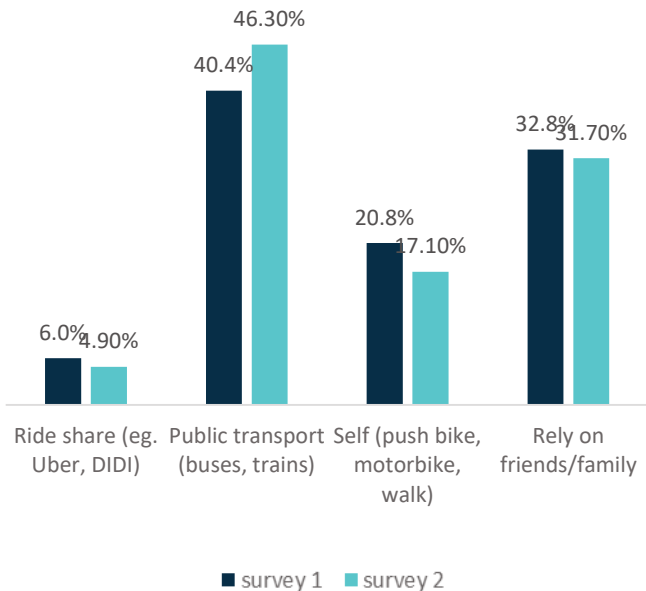
Visibility online is more important now as consumers increase reliance on online research and digital communication with sellers.

'Other' responses included:

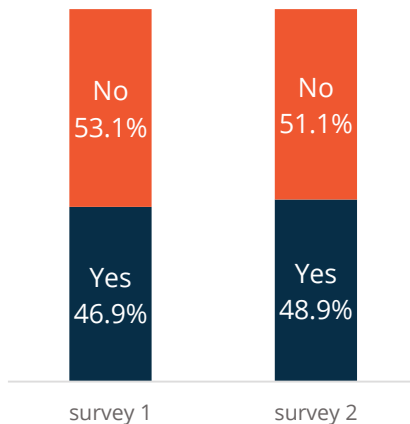
- "Looking at options closer to home"
- "Not looking at private seller cars"
- "I was hoping to buy interstate but am now restricted to my own area due to travel restrictions."
- "Considering electric car to avoid touching petrol pump"

NON CAR OWNERS: TRANSPORT USAGE

Q: "What has been your PRIMARY form of transport?"



Q: "Have you changed your view on your primary form of transport as a result of COVID-19?"



'Yes' respondents got asked, in what way...

"Prefer to drive myself"

"Less Ubers as I don't want to catch COVID from other ride share users or drivers"

"I will never step foot on a public bus ever again"

"I intend to buy a car to reduce contact with people"

"Avoid anything public or shared including uber and taxi"



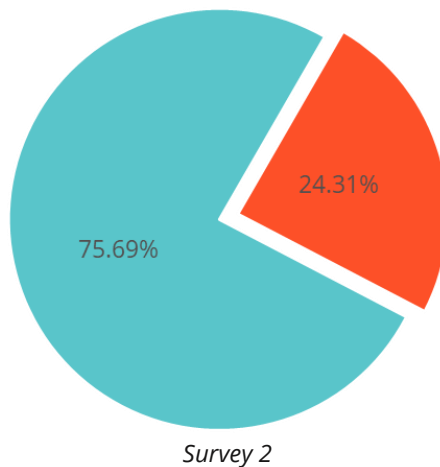
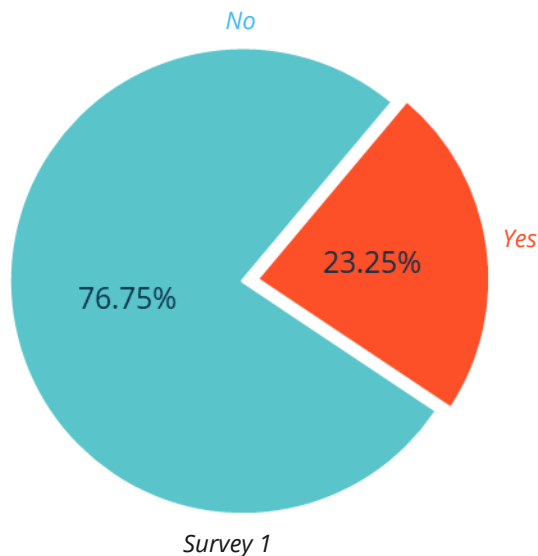
NEWLY LICENCED DRIVERS

Survey 1: 26th JUNE – 2nd JULY, 2020. n=6,117

Survey 2: 23rd JULY – 25TH JULY 2020. n=3,291

NEWLY LICENCED DRIVERS

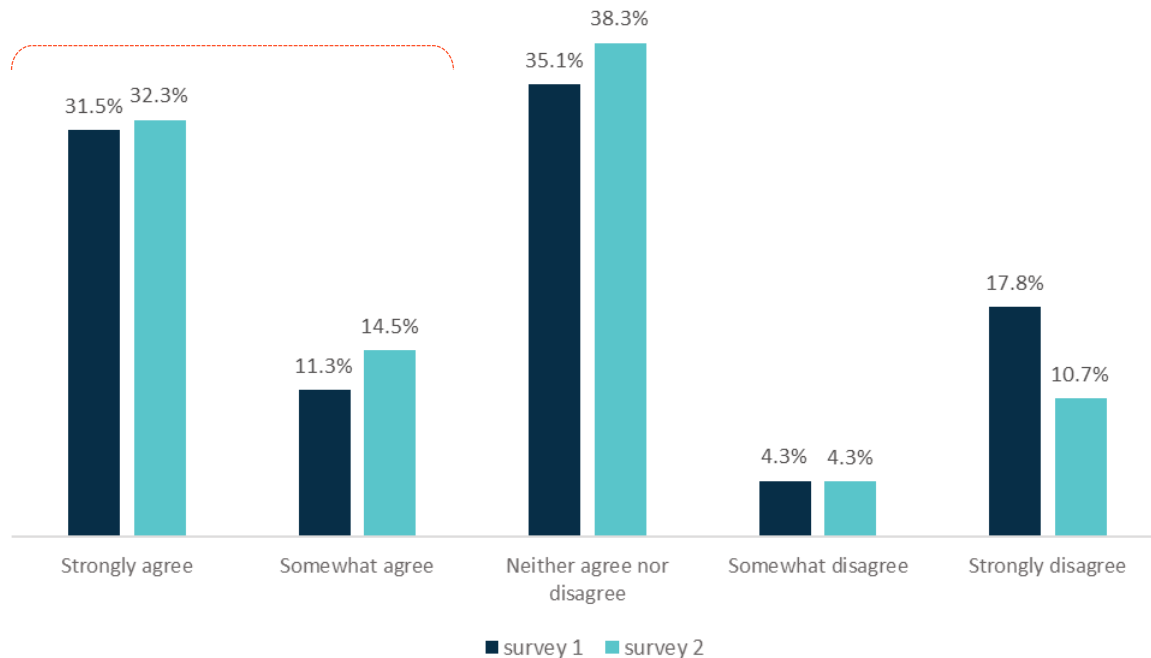
Q: "Have you recently passed your driver's licence (within the last 6mths), or are waiting to sit your licence?"



At a similar level to the first survey, **almost a quarter of all** respondents said they had recently passed their drivers licence, or were waiting to sit their licence.

NEWLY LICENCED DRIVERS – impact of COVID-19

Q: "To what extent do you agree that COVID-19 accelerated your need to get your driver licence?"



Almost **47%** of new licence holders in our second survey agree¹ that COVID-19 has accelerated their need to get their driver licence.

¹ Sum of "strongly agree" and "somewhat agree"

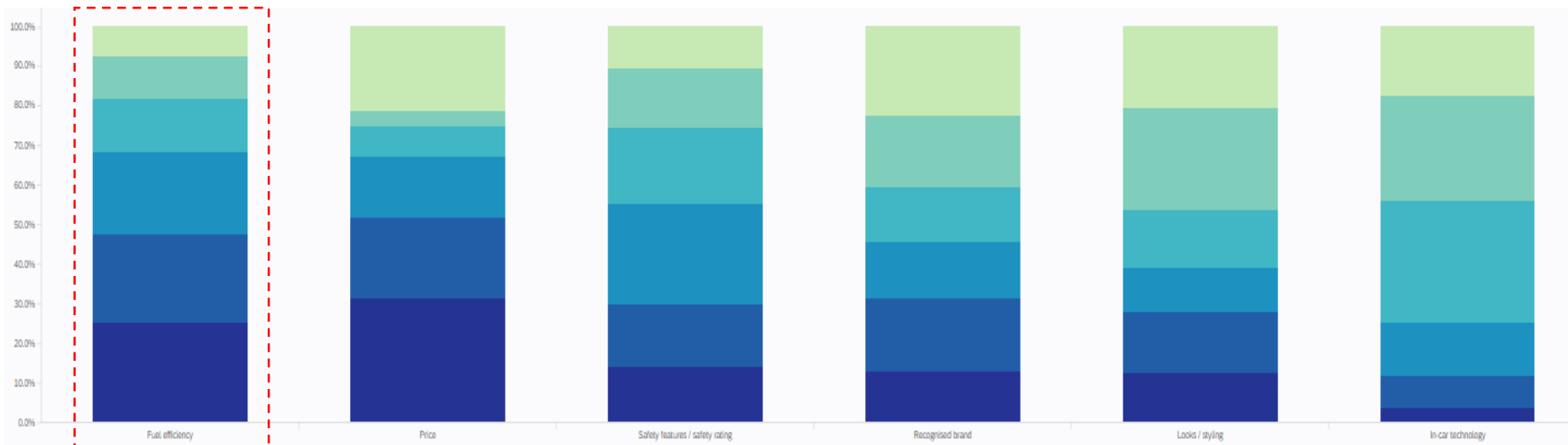
Source: Survey 1: Newly licenced driver onsite survey, 26th June – 2nd July, 2020. Filtered by respondents who had recently obtained their licence, n=1,086, Survey 2: Newly licenced driver onsite survey v2, 23rd July – 25th July, 2020. Filtered by respondents who had recently obtained their licence, n=588

NEWLY LICENCED DRIVERS

Q: "What are the most important factors in deciding which car to buy? (rank in order of 1-6 from most to least important)"

MOST IMPORTANT

LEAST IMPORTANT

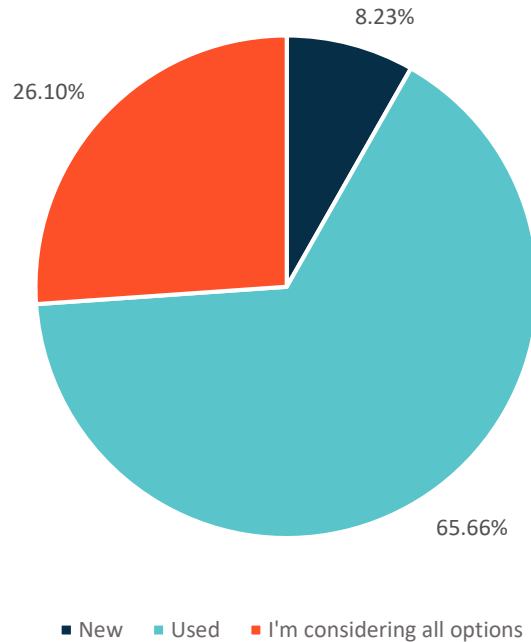


(Ordered here from most to least important based on overall rankings...)



While "Price" was ranked first by more respondents, overall, **fuel efficiency** was most important. Followed by price, safety, recognised brand, design and then the least important was "**in-car technology**".

NEWLY LICENCED DRIVERS CAR TYPE PREFERENCE



For **34.33%** of newly licenced drivers a **new car is in the consideration.**



WRAP UP

As advertisers you can absolutely influence consumers that are utilising destination sites like carsales.

We have sustained demand with a new cohort of buyers.

...Buyers that are now more than ever relying on online research to make their decision. So be visible with all your offering.



FURTHER RESEARCH & RESOURCES

AFTER MORE ACTIONABLE INSIGHTS? VISIT [BUSINESS.CARSALES.COM.AU](https://business.carsales.com.au)

CARSALES Online and On Demand Webinars: <https://business.carsales.com.au/events/>

CARSALES Articles and Insights: <https://business.carsales.com.au/insights/>

Relevant links highlighted from Insights page:

<https://business.carsales.com.au/insights/auto-industry-news/search-behaviour-review-june-2020/>

<https://business.carsales.com.au/insights/auto-industry-news/auto-pulse-strong-activity-and-june-new-cars-surprise/>

<https://business.carsales.com.au/insights/auto-industry-news/carsales-supports-victorian-dealers-with-open-for-business-marketing/>

<https://business.carsales.com.au/insights/download-edition-19-of-carsales-auto-market-watch/>

<https://business.carsales.com.au/insights/auto-industry-news/consumer-sentiment-and-new-car-intenders/>

<https://business.carsales.com.au/insights/auto-industry-news/auto-pulse-suvs-and-lcvs-fuel-another-record-week-of-car-shopping/>

<https://business.carsales.com.au/insights/auto-industry-news/car-ownership-to-rise-post-covid-19/>

SOME QUESTIONS ANSWERED – Impact on consumer behaviours in VIC in July?

For more please email vanya@carsales.com.au

Victoria's share against other states remains down year on year across all tested metrics.

However YOY all metrics are up.

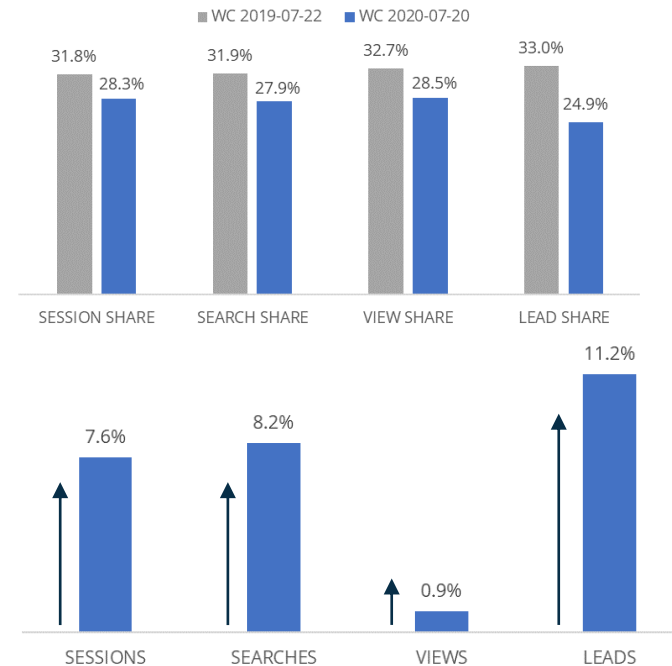
In the week commencing 22nd July, users in Victoria were responsible for:

- 2.0m sessions
- 10.3m searches
- 4.7m vehicle views

As carsales we are also supporting the Victorian market through our own marketing efforts. Link to full story here:

<https://business.carsales.com.au/insights/auto-industry-news/carsales-supports-victorian-dealers-with-open-for-business-marketing/>

Victoria's share of metrics & YOY Growth

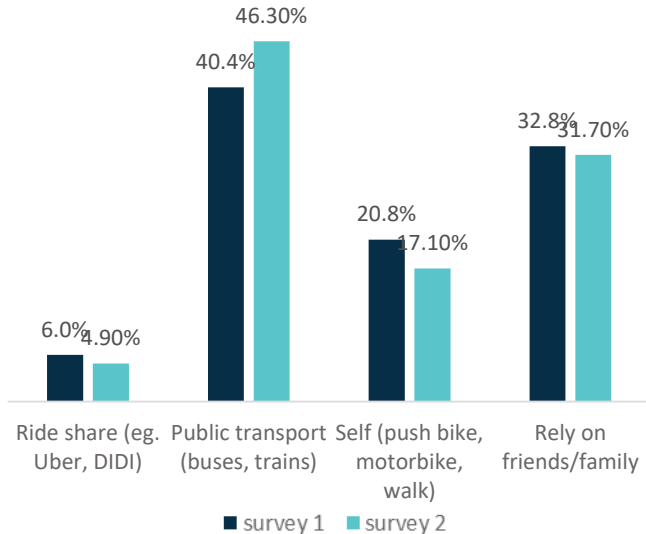


SOME QUESTIONS ANSWERED – What are some of the reasons car buying is more urgent now than ever?

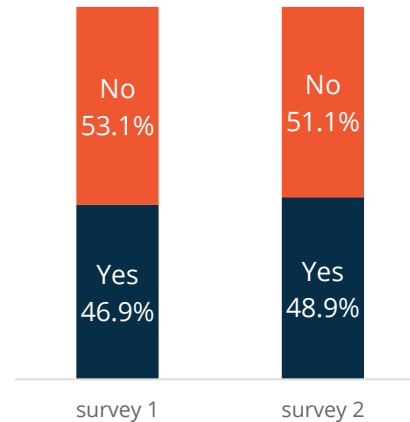
For more please email vanya@carsales.com.au

NON CAR OWNERS: TRANSPORT USAGE – change in primary form of transport is one of the trends driving this demand due to concerns around proximity to people in public transport and ride sharing. Verbatims below give some colour to this.

Q: “What has been your PRIMARY form of transport?”



Q: “Have you changed your view on your primary form of transport as a result of COVID-19?”



‘Yes’ respondents got asked, in what way...

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“Less Ubers as I don’t want to catch COVID from other ride share users or drivers”

“I will never step foot on a public bus ever again”

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