



Moments  
that  
Matter

*automotive*

THE  
*growth*  
DISTILLERY

# Welcome to The Moments That Matter



**In an ever-changing world, the path-to-purchase is becoming more complex and confusing. This program will look to uncover the 'Moments that Matter' in consumer decision making for a series of six of Australia's most important categories in 2024.**

**What the program will explore.** The key moments that matter along the purchase journey, build awareness of the consumer needs, propellers and blockers at each stage, and spotlight the common signals and signposts that brands and publishers' can use to anticipate and intercept consumers at each 'moment that matters'.

**Why brands and agencies will care.** It will help marketers and agencies understand the critical junctions of the decision process, and 'how to win' at each step. Solve for the needs in these moments, to help drive consumers' through each stage of the purchase funnel, and most importantly, convert at the checkout.

**How we're bringing it to life.**

The Growth Distillery team, in collaboration with NewsAmp, will tackle highly valuable consumer sectors, using a combination of methodologies to identify the key toll-gates along each industry's unique purchase journey.

The buying journey has been  
meaningfully **destabilised**,  
and the industry is at a  
**point of inflection**

... buyers are inexperienced decision makers  
at every step AND there's more of them than  
ever before

# The landscape is evolving **rapidly**

## *supply*

Regulations, supply chain delays, customs and quarantine, all impacting decisions around new vs used, origins, budgets and timelines.

## *demand*

More and new choices of brands and features, emerging tech, fuel modes and infrastructure ... and buyers also have to wait for it.

## *needs*

Evolving life and lifestage dynamics coupled with COL are impacting total true-cost affordability.



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# Intention has rebounded dramatically

3.2M


Buyers in March 2020.

6.6M

In Dec 2023.

*... a 113% increase in active intention over the past 3.5 years*





Buyers are in the market... whether they **like it** or **not**

HALF

Are prompted by triggers with, or the lack of an existing vehicle.

1 in 3

Have changing life or lifestyle demands for more/better space.

2 in 5

Seek something newer and better (e.g. tech and/or prestige features).



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The sheer volume of buyer **understanding** and **nuance** required in this new dynamic cannot be understated

... we know *psychological safety* (feeling **comfortable** and **assured**) contributes to 60% of a consumer's decision making ability

And we can see...

Buyers are already **highly** and **actively** engaging with the category, seeking guidance

63%

Often discuss the auto sector with others they know.

70%

Look at auto listings and/or visit dealerships out of curiosity.

59%

Like to keep an always on eye on the car market.

50%

Are consumers of category content and channels on a regular basis.



The pace of change is driving **greater hunger** for information and support

HALF

Feel overwhelmed by rapid pace of sector changes and innovations.

1 in 4

Say sector news, info & opinion is a top-5 factor impacting their timings/ decision.

96%

Active research during the journey, with average 4 sources and 5 topics referenced highlighting need for (re)assurances).



The fundamentals of a customer journey remain within this new buyer dynamic

# The journey has many stages, each can be complicated and time intensive



But how buyers engage and approach their journey has shifted

# The journey has become **much more complex**

## *cut timelines*

Regulations, supply chain delays, customs and quarantine, all impacting buyers decisions around new vs used, origins, budgets and timelines.

## *compromises*

Attempts to stay on track see half report a sense of urgency.  
1 in 6 buyers adapted their timeline to react to the market, and 2 in 5 purchased something other than they initially intended.

## *true-cost*

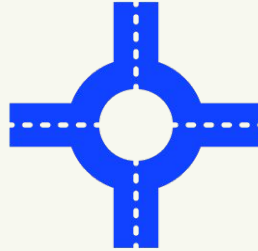
95% call out financial factors as impacting choices - which means purchase price PLUS on-roads, supplementary costs and the role of other life/household expenses.

# This complexity leads to **tipping points** in the journey where buyers drive onward, or need to u-turn



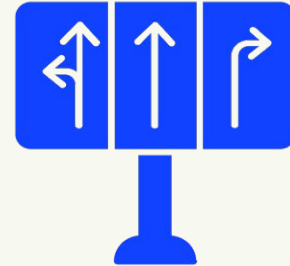
## Speedbumps

Functional, information-based and/or situational hurdles.



## Roundabouts

Emotional sentiment felt at the time.



## Street Signs

Content as a source of influence, information, and inspiration.



# Providing buyers with route guidance in navigating the new roadmap relies on knowing key needs at key moments.

## *Cue the moments that matter.*

Key points in the journey when car buyers are most emotional and least comfortable.

By understanding what buyers *need*, and the *triggers* or *blockers* that influence their ability to drive through each stage ...

... we can influence the *street signs and signals* they to better direct consumers through the process, avoid mistakes and drive positive outcomes.





Moment  
01

# (re)Calibration

## Why it matters:

This is the first point of meaningful category contact and friction in the mind of the consumer.

They are confronted with the realities of a new market with higher prices and less supply.

They're quickly overwhelmed, and also often expecting the worst.

## The opportunity:

Marketers need to re-establish their credentials within this (re)calibration.

If you can disrupt the shock and help them feel more comfortable early on, it will help establish stickiness of your brand/channel with them.

Tonally lean into possibilities and highlight practical tools which help them align criteria to reality.

2in5

Take longer than 4 weeks in this stage of the journey

Moment

02

# Conviction

## Why it matters:

A crucial time of high cognitive load, expectation and pressure.

All their research comes together, and engagement begins narrow as they settle on the must have make, model, specs

They are also having tangible exposure via test-drives and in-person visits which can either muddy or clarify the waters.

## The opportunity:

The ideal role for marketers is to help build agency, enabling buyers to feel organised and therefore confident.

If we can make it easy for them to discover, collate and compare options, and then give them the tools to prioritise they will feel less confused and therefore more likely to make a decision

60%

of car make/model decisions are made at this point of the journey, and more than half are doing test drives



Moment  
03

# Commitment

## Why it matters:

The stakes are high, there is a lot riding on making the right choice at the right time.

They know what they want, but it may not be easy to find, or be without more compromise (e.g. wait-times, cost, inclusions).

They are also busy managing purchase specifics and adjacencies to ownership (finance, rego, insurance, accessories).

## The opportunity:

Marketers can continue to show-up with tools, lists and guides which make it easier to keep on track (and on budget, with a true-cost position) at the final turn

Celebrating their 'right' decision and continuing to engage them (e.g. servicing, aftermarket, fuel tips) will endure you to them, with benefits of advocacy and loyalty.

56%

Seek price and value information, while cost is always a top priority it peaks at this final moment

watch-out...

At any point, buyers can be **forced**, or may **choose**, to **pause, revisit or restart** within their journey

We need to support them through the inevitable u-turns and new information at each moment

# Buyers are engaged and reacting at every stage of the journey

“Take your time, do your research and don’t settle for, even if it is second hand car you’re looking at. It’s your car”

(male, 25-34, past purchaser)

## MtM 1. (re)Calibration

**U-turn = Price Shock**  
**Drive-on = Price Comfort**



CONTENT SIGNPOSTS:

**Initial passive search.**

Sector news focus, price and supply discovery



FUNCTIONAL SPEEDBUMPS:

Price tag, COL pressures and interest rate rises



EMOTIONAL ROUNDABOUTS:

Optimism, Excitement ... and Anxiety

## MtM 2. Conviction

**U-turn = Waiting Times**  
**Drive-on = In Stock**



CONTENT SIGNPOSTS:

**High active research.**

Vehicle and specs based details



FUNCTIONAL SPEEDBUMPS:

Supply, wait-times, costs and affordability



EMOTIONAL ROUNDABOUTS:

Confidence & Excitement, some Confusion

## MtM 3. Commitment

**U-turn = Unaffordable**  
**Drive-on = In Budget**



CONTENT SIGNPOSTS:

**Reduction in search.**

Finalising purchase details (finance, rego, accessories)



FUNCTIONAL SPEEDBUMPS:

Purchase price, ongoing cost considerations



EMOTIONAL ROUNDABOUTS:

Excitement, some Stress... and ultimately Relief!

It's also important to remember...

Not everyone starts their car journey in the same place with the same need

... while the moments are consistently experienced, a buyers needs and wants within these can vary



We isolated 5 dominant buyer contexts driven by needs and lifestage

# A snapshot of our buyer segments, each with unique needs at the moments that matter

## UPGRADERS



Seeking to upgrade to the latest and greatest car/options that the sector has to offer them.

## UPSIZERS



Looking for something bigger and more comfortable to accommodate their lifestyle and lifestage.

## SET-UPPERS



Enthusiasts who are starting out or beginning a project, however low budgets impact options.

## A-TO-B



Buyers who want a no-frills purchase - a practical, safe and easy option for their daily drive.

## CONSOLIDATORS



Wanting to reduce their automotive footprint through smaller and cheaper options.

What you need to know about ...

# Upgraders



Seeking to upgrade to the latest and greatest car that the sector has to offer them

18%  
of buyers

WHO they are

Busy professionals who are tech-savvy, affluent and educated. Established families, living in metro areas. They drive often and enjoy driving and the category

WHY a car now

Seeking the newest and highest spec/tech, they can afford it so want to indulge/reward themselves

WHAT they want

Top-performance, prestige and newer - they want it all. Leaning towards EVs, large SUV and modern options

WHEN they want it















Are impatient, but don't want to compromise, they'll take time to secure the best option and jump on it

WHERE they look

Self-directed and well-referenced, have high usage of online, review sites/forums and magazines as 'experts'



# What are their Moments that Matter?

<b>Driver</b>	Tech savvy and affluent buyers seeking to upgrade to the latest and greatest car that the sector has to offer them		
<b>Moments</b>	Discovery of options given finances / funding is in order and looking to replace an older car	Considerations on the top technologies and most modern options that are available to them	Priorities given to the experience of driving and the comforts that the latest provides
	<b>MtM 1: (re)Calibration</b> (Awareness to Passive Consideration)	<b>MtM 2: Conviction</b> (Active Consideration to Decision)	<b>MtM 3: Commitment</b> (Decision to Execution)
<b>Content Signposts</b>	 Car websites  CarSales.com.au website  Family, friends & colleagues	 Dealership in person  Test drive  Car websites	 Dealership in person  Test drive  Own experience / knowledge
<b>Content Signals</b>	<ol style="list-style-type: none"> <li>1. Performance specifications</li> <li>2. Purchase price / market values</li> </ol>	<ol style="list-style-type: none"> <li>1. New technologies</li> <li>2. About a particular make / model of car</li> </ol>	<ol style="list-style-type: none"> <li>1. New technologies</li> <li>2. Purchase price / market values</li> </ol>
<b>Roundabouts</b>	 <b>Optimism</b>  <b>Excitement</b>	 <b>Excitement</b>  <b>Confidence</b>	 <b>Excitement</b>
<b>Speedbumps</b>	<ol style="list-style-type: none"> <li>1. Cost of living / interest rate pressures</li> <li>2. New / used car prices</li> </ol>	<ol style="list-style-type: none"> <li>1. Supply chain / delays / availability</li> <li>2. Cost of living / interest rate pressures</li> </ol>	<ol style="list-style-type: none"> <li>1. New / used car prices</li> <li>2. Supply chain / delays / availability</li> </ol>

# What is their buyer journey?

**32 weeks**  
Total Duration  
(19 weeks active)

13 weeks  
Passive Awareness

6 weeks  
Active Awareness

5 weeks  
Passive Consideration

3 weeks  
Active Consideration

3 weeks  
Decision

2 weeks  
Execution

## MtM 1: (re)Calibration

(Awareness to Passive Consideration)

## MtM 2: Conviction

(Active Consideration to Decision)

## MtM 3: Commitment

(Decision to Execution)

*"I am assessing whether the item aligns with my needs and priorities is an important step in the decision-making process. Other major considerations include research and information and then the financial considerations"*

(Male, 25-34, Intender, Upgrader)

Content

Channels

Performance specifications

Word of mouth

Purchase price / market values

Published reviews from experts

New technologies

Word of mouth

About a particular Car / model of car

Social media influencers

New Technologies

Car websites

Purchase price / market values

Word of mouth

What is new in the Auto category?

New technologies

Modern upgrades

Which upgrades / technologies do I want?

What is the best I can afford?

Car make / model

What options are available now, later, or alternatives?

What you need to know about ...

# Upsizers



Looking for something bigger and more comfortable to accommodate their evolving lifestyle and lifestage

16%  
of buyers

WHO they are

Skew towards small and growing families (requiring a carseat), more likely a female decision maker  
Frequent and longer-distance drivers, size matters.

WHY a car now

Family and lifestyle needs are evolving and they require something more suitable (size, safety).

WHAT they want

Size and suitability drive preferences, with SUVs topping the list, but less adamant on fuel or age.

WHEN they want it

A notable sense of urgency, with growing family and associated lifestyle needs.

WHERE they look

Predominantly go online, but also turn to word-of-mouth and their own network of experts .

# What are their Moments that Matter?





# What is their buyer journey?

**28 weeks**  
**Total Duration**  
(18 weeks active)

10 weeks  
Passive Awareness

5 weeks  
Active Awareness

4 weeks  
Passive Consideration

4 weeks  
Active Consideration

2 weeks  
Decision

3 weeks  
Execution

## MtM 1: (re)Calibration

(Awareness to Passive Consideration)

## MtM 2: Conviction

(Active Consideration to Decision)

## MtM 3: Commitment

(Decision to Execution)

How has lifestyle &/or life stage changed?

Type of upgrades

Which safety features / specifications are important?

What size capacity will we need?

Purchase price / Market values

Vehicle size / Storage capacity

Vehicle size / Storage capacity

Performance specifications

Vehicle size / Storage capacity

Performance specifications

Content

Channels

Word of mouth

Live exhibitions  
Car shows

Newspaper  
Articles / sections/NIMS

Car websites

Car websites

Newspapers

What can I realistically afford?

Evaluating options

What is the availability / wait time?

*“Be practical with your decisions. The economy is unstable, and your thought process should be informed and stable. I need the space, with multiple children, in multiple sporting activities. Needing the space now”*

(Female, 25-34, Intender, Upsizer)

What you need to know about ...

# Set-Uppers



Enthusiasts who are starting out or beginning new project, however low budgets impact options

29%  
of buyers

**WHO** they are  
Passionate and optimistic, skew to millennials (under 35s), more likely to be male single.  
Highly category engaged, but don't own a car (yet).
















**WHY** a car now  
Desiring a car of their own, an emotional boost buy also a practical one for work/travel.

**WHAT** they want  
They want prestige and reputation, however budgets also mean older and second-hand are top of the list.

**WHEN** they want it  
Spend the least time in the journey, and while there is no real urgency, they can be impatient.

**WHERE** they look  
They consider themselves well-versed via various channels, over-indexing to social media.

# What are their Moments that Matter?

<b>Driver</b>	<p>Enthusiasts who are starting out or beginning a project, however low budgets impact options. A balance of emotional and practical factors</p>		
<b>Moments</b>	<p>Discovery of options given finances / funding is in order and the ability for car ownership</p>	<p>An increase in income and often a first car means balancing practical and lifestyle needs</p>	<p>Starting out entails considerations on financials and the number of seats / size that will be needed</p>
	<p><b>MtM 1: (re)Calibration</b> (Awareness to Passive Consideration)</p>	<p><b>MtM 2: Conviction</b> (Active Consideration to Decision)</p>	<p><b>MtM 3: Commitment</b> (Decision to Execution)</p>
<b>Content Signposts</b>	<p> Car websites</p> <p> Family, friends &amp; colleagues</p> <p> Online / social marketplace</p>	<p> Dealership website</p> <p> Family, friends &amp; colleagues</p> <p> Dealership in person</p>	<p> Family, friends &amp; colleagues</p> <p> Test drive</p> <p> Car websites</p>
<b>Content Signals</b>	<p>1. Purchase price / market values</p> <p>2. Suitability for lifestyle</p>	<p>1. Running costs</p> <p>2. Warranty periods and coverage</p>	<p>1. Purchase price / market values</p> <p>2. Running costs</p>
<b>Roundabouts</b>	<p> <b>Excitement</b></p> <p> <b>Optimism</b></p>	<p> <b>Excitement</b></p> <p> <b>Optimism</b></p>	<p> <b>Excitement</b></p> <p> <b>Optimism</b></p>
<b>Speedbumps</b>	<p>1. Cost of living / interest rate pressures</p> <p>2. Maintenance / insurance / fuel costs</p>	<p>1. New / used car prices</p> <p>2. Maintenance / insurance / fuel costs</p>	<p>1. New / used car prices</p> <p>2. Maintenance / insurance / fuel costs</p>

# What is their buyer journey?

**26 weeks**  
**Total Duration**  
(17 weeks active)

10 weeks  
Passive Awareness

5 weeks  
Active Awareness

4 weeks  
Passive Consideration

3 weeks  
Active Consideration

2 weeks  
Decision

2 weeks  
Execution

## MtM 1: (re)Calibration

(Awareness to Passive Consideration)

## MtM 2: Conviction

(Active Consideration to Decision)

## MtM 3: Commitment

(Decision to Execution)

What car do I want  
(and what do I need)?

Is it achievable?

Balancing needs versus  
wants versus reality

Does it suit my  
lifestyle?

*"I had saved enough money to purchase a second hand car. Also the second hand car market was in a better place than what it was 12 months ago. I did lots of research leading into purchasing the car so I am happy"*

(Male, 18-24, Intender, Set-Upper)

Content  
Channels

Purchase price /  
market values

Newspaper

Suitability for  
lifestyle

Social media  
influencers

Running  
costs

Newspaper  
Articles /  
sections /  
liftouts

Warranty  
periods  
And coverage

Word of  
mouth

Purchase price /  
market values

Car  
websites

Running  
costs

Word of  
mouth

What can I afford?  
What do I  
compromise?

What costs should  
I consider?

What are the ongoing costs  
I should be aware of?

What you need to know about ...

# A to B-ers



Buyers who want a no-frills purchase - a practical, safe and easy option for their daily drive

WHO they are

Gen X-ers (aged 35-55), and with mature/adult families where car-seats not required.  
Low engagement and interest in automotive.

WHY a car now

Reluctantly replacing an outdated, damaged or written-off car, need something to get them around.

WHAT they want

A basic mainstream car which they can rely on, they have little/no need for upgrades.

WHEN they want it

They aren't rushed, although there is a need to replace their old/damaged current car.
















WHERE they look

Turn to search engines and websites, and they aren't big content consumers.

31%  
of buyers



# What are their Moments that Matter?

<b>Driver</b>	Buyers who want a no-frills purchase - a practical, safe and easy option for their daily drive to replace their old / damaged car with low urgency		
<b>Moments</b>	A functional requirement based on the age / condition of their current vehicle	Considerations on what their basic needs are as a replacement	Practical features such as fuel efficiency and comfort for daily use factored in
	<b>MtM 1: (re)Calibration</b> (Awareness to Passive Consideration)	<b>MtM 2: Conviction</b> (Active Consideration to Decision)	<b>MtM 3: Commitment</b> (Decision to Execution)
<b>Content Signposts</b>	 Car websites  Family, friends & colleagues  CarSales.com.au website	 Family, friends & colleagues  Dealership in person  Test drive	 Dealership in person  Test drive  Family, friends & colleagues
<b>Content Signals</b>	1. Purchase price / market values 2. Running costs	1. Purchase price / market values 2. Safety specifications and ratings	1. Running costs 2. Safety specifications and ratings
<b>Roundabouts</b>	 <b>Optimism</b>  <b>Confidence</b>	 <b>Confidence</b>  <b>Anxiety / Stress</b>	 <b>Relief / comfort</b>  <b>Confidence</b>
<b>Speedbumps</b>	1. Cost of living / interest rate pressures 2. New / used car prices	1. New / used car prices 2. Supply chain / delays / availability	1. New / used car prices 2. Maintenance / insurance / fuel costs



# What is their buyer journey?

**32 weeks**  
**Total Duration**  
(20 weeks active)

12 weeks  
Passive Awareness

6 weeks  
Active Awareness

6 weeks  
Passive Consideration

4 weeks  
Active Consideration

3 weeks  
Decision

2 weeks  
Execution

## MtM 1: (re)Calibration

(Awareness to Passive Consideration)

## MtM 2: Conviction

(Active Consideration to Decision)

## MtM 3: Commitment

(Decision to Execution)

Is the time right, do I really need to buy?

What is available

What best deliveron my practical needs?

What is safe / reliable

Purchase price / market value

Running costs

Purchase price / market values

Safety specs and ratings

Running costs

Safety specs and ratings

Content

Channels

Car websites

Published reviews from experts

Magazines

TV shows And segments

Word of mouth

Online / social Media marketplace

What costs are involved?

Evaluating car options

What are the hidden, and ongoing costs?

*“You need to think about how much you like the car and what you will use it for. Research service costs and possible breakdowns. Then maybe you can enjoy the process”*

(Female, 45-54, Intender, A to B)

What you need to know about ...

# Consolidators



Wanting to reduce their automotive footprint through smaller and cheaper options

6%  
of buyers

WHO they are

Older buyers (skews 55+), who are single/empty nesters, retired or retiring, feeling financially stressed  
Low category involvement.

WHY a car now

Something more efficient and more reliable, they have the means and opportunity now.

WHAT they want

A modern car which is fuel efficient, they gravitate towards a Hatchback.

WHEN they want it
















Take longest with more time in awareness phases, price and availability driving timelines both back and forward.

WHERE they look

Predominantly seek information online, and are the most likely to consider News media sources.



# What are their Moments that Matter?

<b>Driver</b>	<p>Wanting to reduce their total automotive footprint through smaller and cheaper options with fuel efficiency and reliability top considerations</p>		
<b>Moments</b>	<p>Realisation of the need for a new vehicle mostly due to the age of their car however not urgent</p>	<p>Requirements dictate a smaller vehicle with a preference for modern and better technology</p>	<p>Post purchase considerations with warranty and servicing/maintenance history are factored in</p>
	<p><b>MtM 1: (re)Calibration</b> (Awareness to Passive Consideration)</p>	<p><b>MtM 2: Conviction</b> (Active Consideration to Decision)</p>	<p><b>MtM 3: Commitment</b> (Decision to Execution)</p>
<b>Content Signposts</b>	<p>  Car websites   Family, friends &amp; colleagues   Newspaper Articles / ads         </p>	<p>  Test drive   Dealership in person   Family, friends &amp; colleagues         </p>	<p>  Test drive   Car websites   Dealership in person         </p>
<b>Content Signals</b>	<p>           1. Purchase price / market values            2. Running costs         </p>	<p>           1. Warranty periods and coverage            2. Stock availability and wait times         </p>	<p>           1. Warranty periods and coverage            2. Different fuel types / efficiencies         </p>
<b>Roundabouts</b>	<p>  <b>Optimism</b>   <b>Excitement</b> </p>	<p>  <b>Excitement</b>   <b>Confidence</b> </p>	<p>  <b>Excitement</b>   <b>optimism</b> </p>
<b>Speedbumps</b>	<p>           1. New / used car prices            2. Cost of living / interest rate pressures         </p>	<p>           1. New / used car prices            2. Supply chain / delays / availability         </p>	<p>           1. New / used car prices            2. Maintenance/servicing +fuel/insurance         </p>

# What is their buyer journey?

**37 weeks**  
**Total Duration**  
(23 weeks active)

14 weeks  
Passive Awareness

8 weeks  
Active Awareness

5 weeks  
Passive Consideration

4 weeks  
Active Consideration

3 weeks  
Decision

4 weeks  
Execution

## MtM 1: (re)Calibration

(Awareness to Passive Consideration)

## MtM 2: Conviction

(Active Consideration to Decision)

## MtM 3: Commitment

(Decision to Execution)

What essentials do / will I now need?

Type of upgrades

How reliable and fuel efficient are options?

What size/capacity do I need now

Purchase price / market values

Running costs

Warranty period / coverage

Stock availability / wait times

Warranty period / coverage

Different fuel types / efficiencies

Content

Channels

Newspaper Article / ads

Magazines

Car websites

Newspapers

Car websites

TV shows, segments

What is my all-in / willing budget?

What is readily/easily available?

What post purchase costs should I factor in?

*“At the time I was spending far too much money on servicing and fuel for the car I had which was already quite old at that time so decided to upgrade to something more manageable”*

(Male, 45-54, Intender, Consolidator)



## Key takeaways for marketers

# We need to demonstrate **empathy** for inexperienced buyers at each stage

1. **Be the Trusted Advisor** - Given the complexities introduced by turbulent supply and demand, we need to (re)educate buyers and become a source of knowledge and trust.
2. **Show up at every stage** - Marketers need to (re)establish credentials from the start, and continue to be present as buyers recalibrate and reconsider throughout the entirety of the journey.
3. **Make it personal** - Lean into the emotion associated with individual buyer preferences, behaviours and profiles to deliver more resonant targeted content and offers at their key moments and help make decisioning feel easier.

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