CONSUMER TECH

Own the moments that matter

THE growth DISTILLERY

User Manual

1. The Big Picture

The category dynamics, consumer landscape, and the moments that matter

2. Category Deep Dives

The distinct category journeys, consumer needs and how to activate the moments that matter, across different tech subcategories.

3. Early Adopters

Understanding early adopters, who are they, what makes them distinct, and how to win with them.

The Big Picture

The category dynamics, consumer landscape, and the moments that matter

the growth d_stillery

The consumer landscape has shifted

Today's tech consumers are:

- **More engaged**
- **More tech savvy**
- **More diverse**

COVID-19 acted as a powerful catalyst for tech adoption, bringing forward 10 years of growth in data consumption

With lockdowns confining people to their homes, reliance on consumer electronics surged. From video conferencing to connect with loved ones and e-commerce bringing essential goods to doorsteps, to telemedicine and remote working, technology became the lifeline that kept Australia functioning.

This elevated reliance on digital tools and services **accelerated the uptake** of various electronic devices and **boosted consumer confidence** in technology.

Source: Infrastructure.gov.au

Usage and ownership continues to grow

34

Forecasted **number of internet-connected devices** per household in 2025 . Increasing from 21 items per household in 2021

Whilst uptake and usage of technology skyrocketed during the lockdowns, it continues to rise. Further 5G deployment is fuelling growth of the **Internet of Things,** with spending on IoT forecasted to reach US$24 billion in 2026, a growth of 10% over 5 years.

38%
Increase in mobile phone usage

107%
increase in ownership of **Bluetooth** speakers
(2.5M to 5.1M ppl 14+) 11% to 23%)

21%
increase in ownership of **smart TVs**
(16.2M to 19.6M ppl) 77% to 91%

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This forged a higher engagement with the category, as a way to simplify, enhance or control

89% believe technology has **made communication easier** and more convenient

84% believe technology **improves productivity and efficiency** in work and personal life

77% Say that computers and technology **give me more control** over my life*

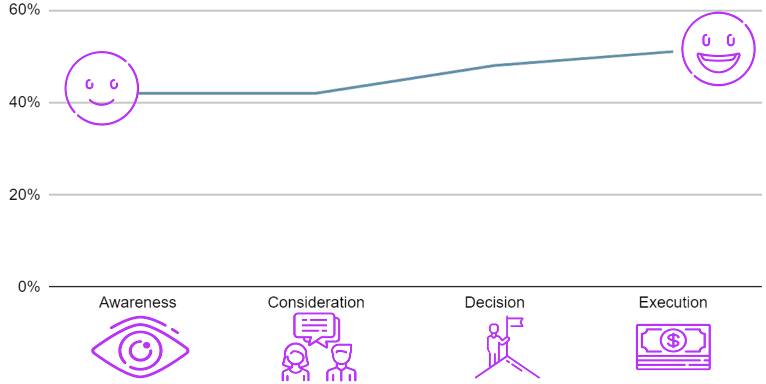
*This sentiment has seen **+14%** growth over the last 5 years, with a significant jump during Covid.

More than just functional utility, technology is fun!

1 in 4

a quarter of all tech purchases are **'a treat for myself'**

Technology is a category people enjoy engaging with. People are **excited about buying tech products** and **enjoy the process**. Excitement is the dominant emotion at the start of the purchase journey and only increases as consumers get closer to the purchase decision.



Not just traditional tech consumers

Older Australians have embraced new technologies, smart home devices and are becoming more tech-savvy.

The surge in technology uptake among older Australians is driven not only by necessity but also by curiosity. As they witness the benefits of smart devices and IoT technology in their everyday lives, confidence in using and adopting these innovations continues to grow.

- 42% of those 60+ say they like to keep up to date with the latest technology

41%

Try to **learn everything they can about new technology** +6% since 2019

Today's consumers are more tech savvy and have high confidence when it comes to technology purchases

76%

of people say they are confident to some degree when purchasing technology products.

This confidence rises significantly for categories with heaviest usage. Mobile phones 91% confidence, Computers 84%, Headphones and speakers 81%

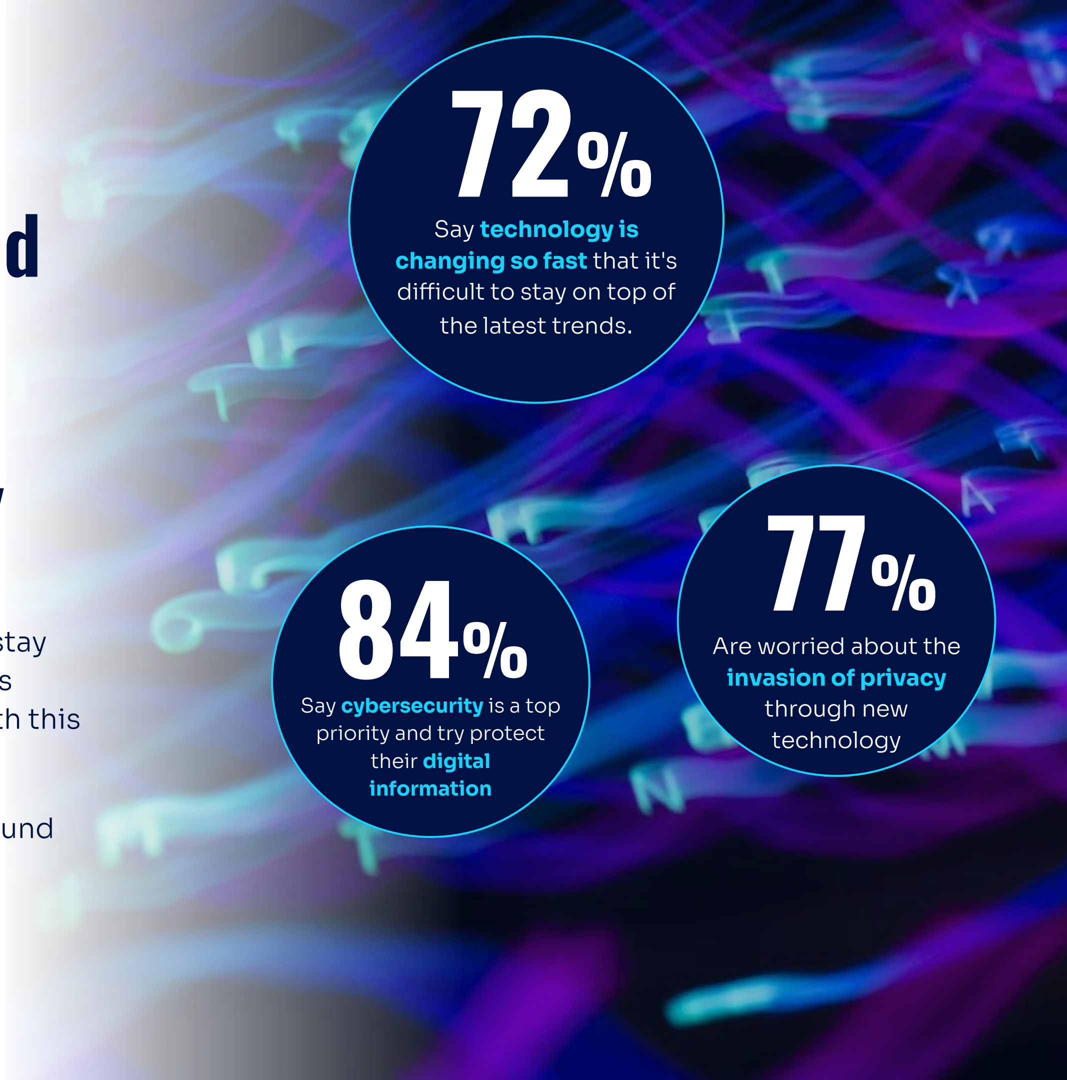
Only **9%** of people say that a **lack of knowledge** is a barrier experienced during the purchase journey

Confidence remains high despite rapid changes and privacy concerns

The fast paced nature of the tech industry, means n**ew trends, new products** and **new innovations** emerge frequently.

This speed of change can be challenging and hard to stay on top of, for the majority of consumers. It even proves challenging for early adopters, with **2 in 3** agreeing with this sentiment.

This rapid change brings with it growing concerns around privacy and cyber security, but not enough to impact engagement with the category as a whole.



72%

Say **technology is changing so fast** that it's difficult to stay on top of the latest trends.

84%

Say **cybersecurity** is a top priority and try protect their **digital information**

77%

Are worried about the **invasion of privacy** through new technology

This evolved consumer landscape brings with it **new purchase dynamics** and **implications for brands and retailers**

There is a shortened window to capture consumers' attention and drive conversion

Two thirds of all tech purchase journeys move from awareness to execution in

1-7 days

High confidence and high engagement, means the purchase journey is not complex or challenging.

- **39%** of people say they experience **no significant hurdles** during the purchase journey.
- The only significant challenges people experience are **price (32%)** and **rising cost of living (25%).**

Brands have a limited time to capture the hearts and minds of consumers.

Price promotions, sales periods and advertising remain crucial triggers to buy*

1in4 tech purchases are triggered by seeing **a special offer/ promotion** or **advertisement**

**Especially for Early Adopters*

Consumers are savvy to the sales cycle and are willing to wait for the right opportunity to buy.

36% of intenders are **waiting for the price to drop** before they purchase,

28% are **waiting for a sales periods** before they purchase(EOFY, Stocktake sales, Black Friday)

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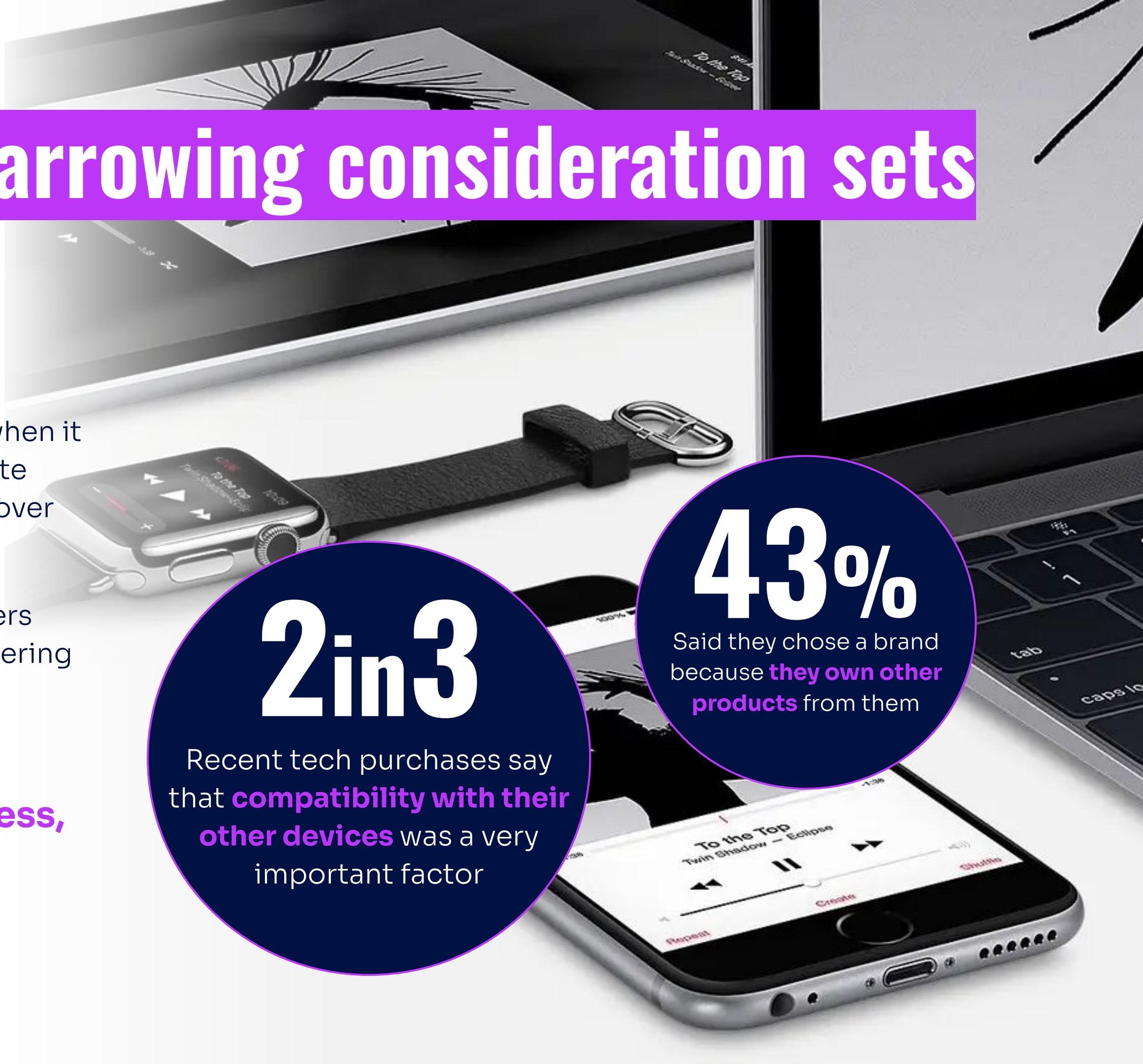
Eco-systems are narrowing consideration sets

People have relatively small consideration sets when it comes to tech products. Brand ecosystems create sticky relationships and have a strong influence over purchase considerations .

At the start of their journey **41%** of tech consumers only have **one brand** in mind and **42%** are considering 2-3 brands.

Brands outside of these ecosystems need to work harder to drive awareness, differentiation and cut through.



2in3

Recent tech purchases say that **compatibility with their other devices** was a very important factor

43%

Said they chose a brand because **they own other products** from them

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Brand awareness is critical

If brands aren't in the initial consideration set, there is only a 10% chance they will be purchased

90%

of all tech consumers **purchased a brand they were considering** at the start of the journey.

Without being part of the initial consideration set, brands face a significant challenge in capturing consumer attention and driving purchase intent. As such an **always on strategy is vital in order to build awareness and consideration.**

This creates 4 distinct stages and roles for brands and retailers

Always ON

Be top of mind, build brand awareness and drive consideration

Activate Trigger

Moving people from passive to active awareness, by **activating trigge**r and building **excitement**

Remove Friction

Ensure that the path to purchase is as seamless and frictionless as possible, by helping people to navigate the category and **compare** options.

Build Relationship

Give **confidence in choice** and create a stickier post purchase relationship for both brand and/or retailer.

Beyond the “always on” there are 3 targettable **Moments that Matter,** where consumer are at their **most open and receptive**

Passive Awareness → Active Awareness → Consideration → Decision → Execution

	Moment 1 **Activate** *(transition from passive to active)*	**Moment 2** **Compare** *(transition from consideration to decision)*	**Moment 3** **Confirm** *(transition from decision to execution)*
What’s the moment?	Consumers are **triggered to act**, they are excited, **open and optimistic** - ready to start their purchase journey	Consumers are in **exploration mode**, **comparing options**, models and prices. **Seeking information** that can help them decide what’s best for them.	Consumers seek to **build confidence in their choice**, reassure they have made the right choice and want a **seamless and frictionless experience**.
Why it matters?	Activating the trigger puts brands and retailers **top of mind, building excitement** and crucially **consideration.**	Opportunity to **influence and actively guide decision-making**, converting consideration into a favorable decision.	Opportunity for brands and retailers to create **stickier post purchase relationships**, build **trust** and foster **brand loyalty or advocacy.**

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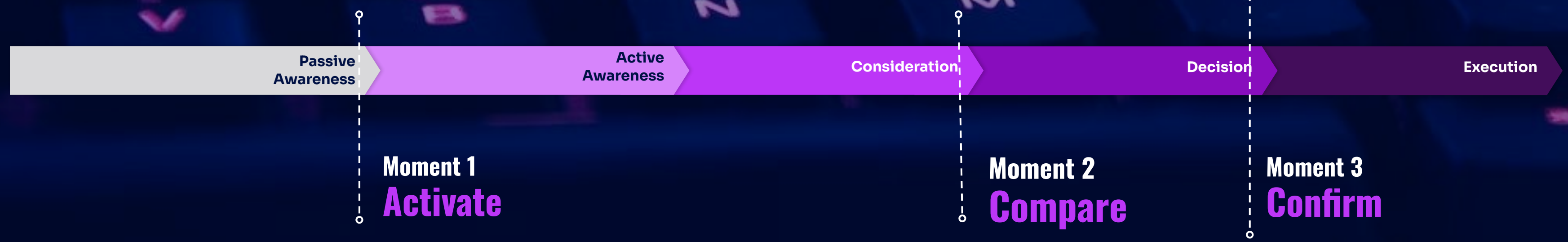
Whilst the moments that matter remain consistent, the touchpoints, sources of influence and information needs vary across different tech categories

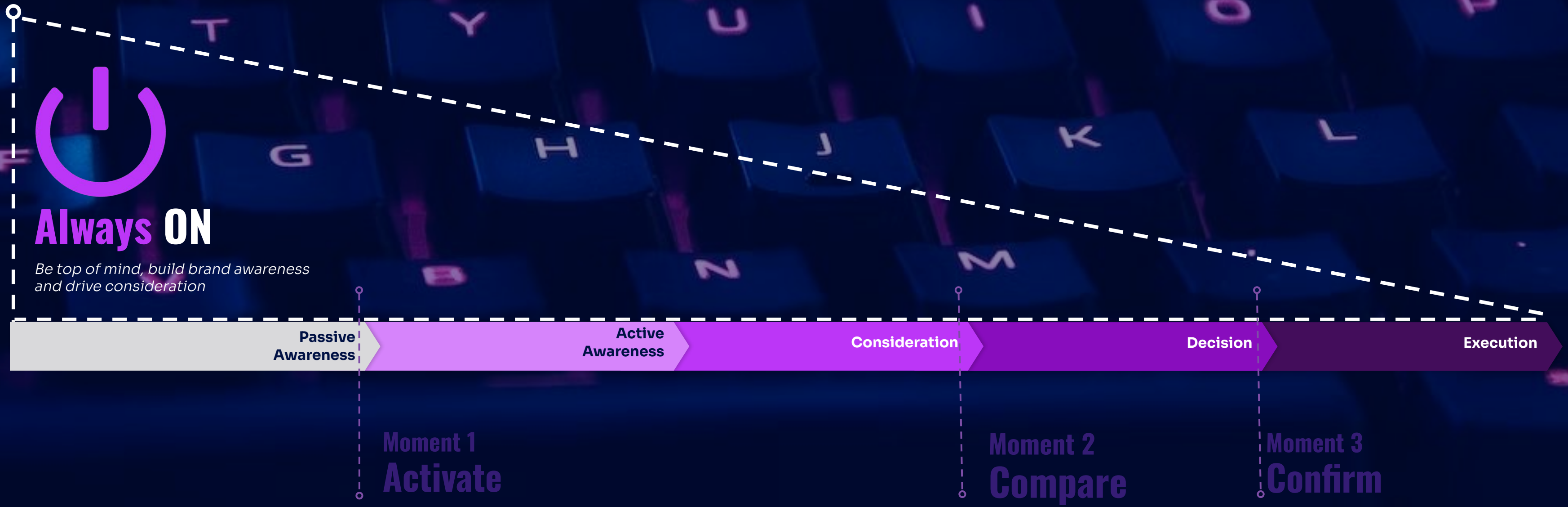
Not all technology categories are created equal. Different categories have nuance in their consumers and their journeys. While crucial moments remain consistent, tailored marketing and content are essential to address diverse touchpoints, influences and information needs effectively.

Brands can win and lose at any moment

Even if a customer is at moment 3, there is still opportunity to intercept



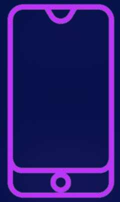
But mastering the ALWAYS ON moment, makes the entire journey easier



Category Deep Dives

The distinct category journeys, consumer needs and how to activate the moments that matter.

The consumer tech sub-segments

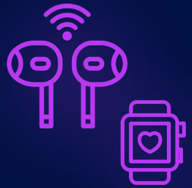


Mobile Phones

Home Office

Includes:

Computers (laptop and desktop)
Tablets
Monitors
Printers and scanners



Personal Tech

Includes:

Headphones
Bluetooth speakers
Smart watches
Fitness Trackers

Home Entertainment

Includes:

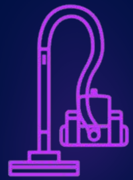
TVs (smart and flat screen)
Surround sound systems
Sound bars
Home theatre projectors
Game Consoles
Smart speakers (Alexa etc)

Personal Grooming

Includes:

Straighteners
Curling Irons
Hair Dryers
Hair Stylers

(all to be valued more than $250)

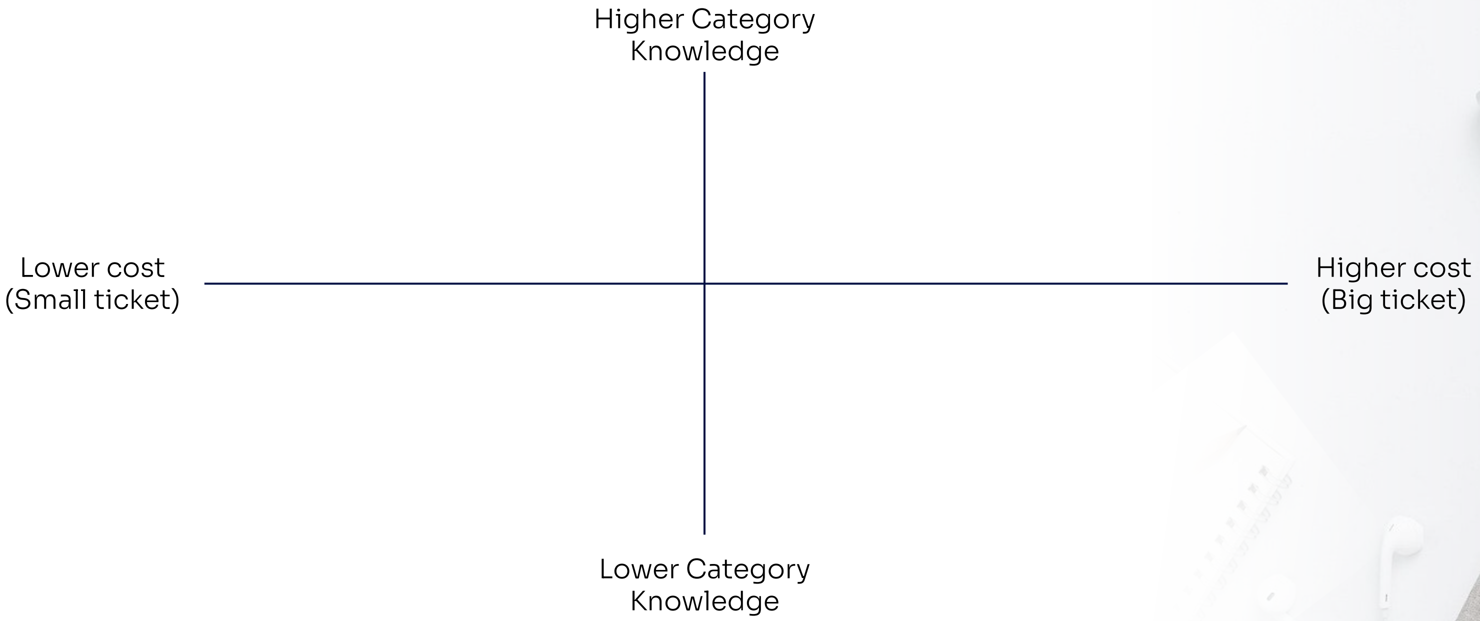


Floor and Environment

Includes:

Stick Vacuum >$300
Robot Vacuum >$300
Air Purifiers

The purchase journey of tech sub-categories pull apart on cost and knowledge



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Lower cost and higher knowledge of a category leads to a shorter purchase journey

Higher Category Knowledge

1

2

Average Journey Length: 10 days

Average Journey Length: 11.7 days

Lower cost (Small ticket)

Higher cost (Big ticket)

Average Journey Length: 13.9 days

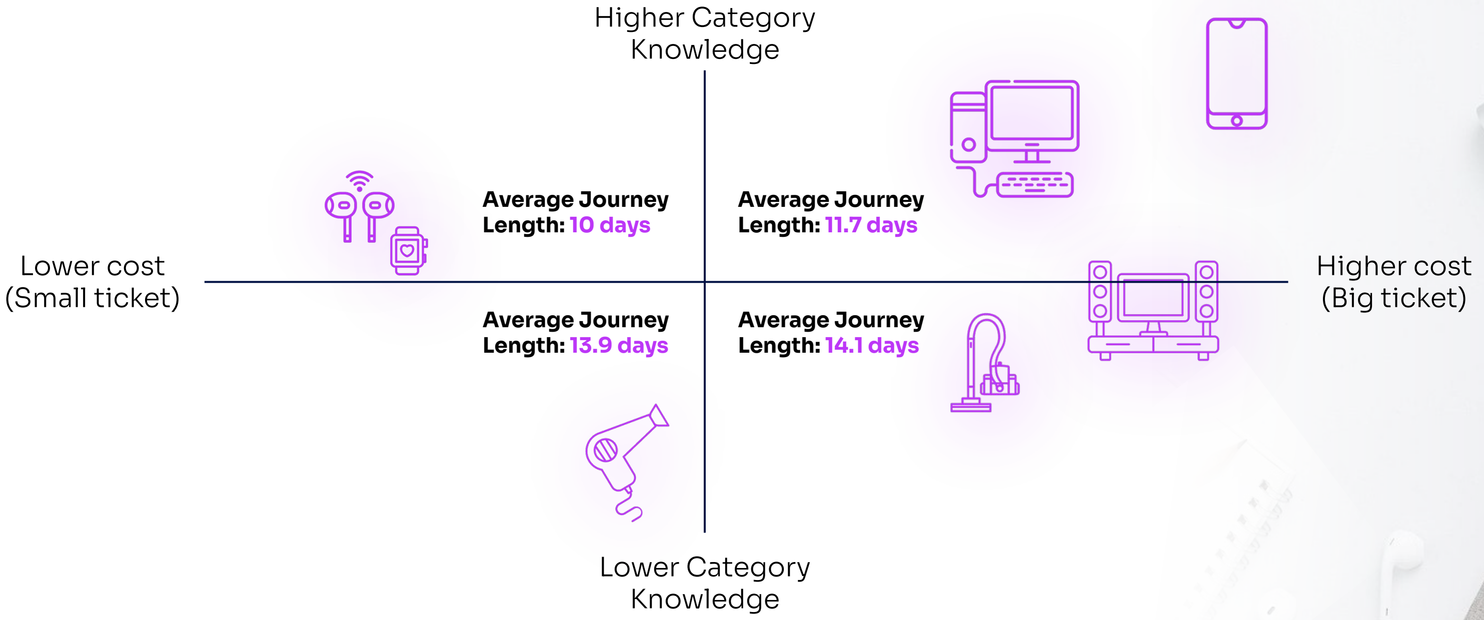
Average Journey Length: 14.1 days

3

4

Lower Category Knowledge

Where sub categories sit



Category Deep Dives

Home Entertainment

Includes: TVs (smart and flat screen) , Surround sound systems, Sound bars, Home theatre projectors, Game Consoles, Smart speakers (Alexa etc)

Category dynamics

Fragmented category

Lower brand loyalty and a **more fragmented category**, means shoppers often rely on **well known or familiar** brands, **positive past experiences** or **recommendations from friends or experts** to aid in their decision-making.

Highest price sensitivity

Shoppers want the best deal or lowest price. **Competitive pricing, discounts and promotions**, especially during peak shopping seasons, have the biggest influence over consideration and purchase decisions. Higher than any other tech category.

Demonstration is desired

The audio-visual nature of the category is best experienced in person. Being able to **see, hear, and test** the product in-store helps them **assess features, size and overall suitability** for their needs.

Who's buying?

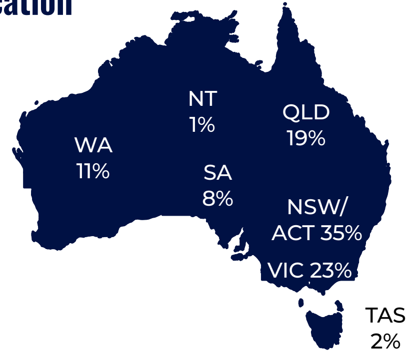
60% Male | **40%** Female

Average hh income of **$94,153**

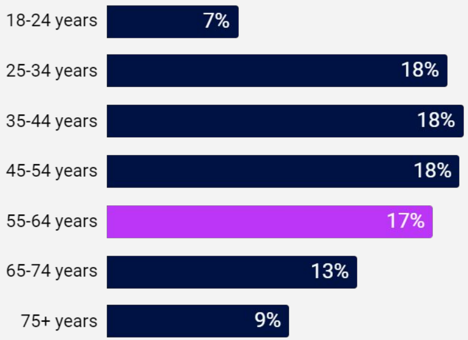
56% Working full or part time

22% retired

Location



Age



HH Profile

1in5 **Empty Nester** households

1in3 **No children** households, their single or couples

Category Attitudes

87% I believe tech has made communication easier and more convenient

84% Take precautions to protect their digital information

84% Believe tech improves productivity and efficiency in work and personal

77% Worried about invasion of privacy through new technology

75% Technology gives me more control over my life

73% Find technology is changing so fast it's difficult to keep up

69% As long a product is functional, I don't care about brands

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Significantly above average compared to all buyers

What are they looking for?

Triggers

32% Saw an offer, promotion or advertisement (129ix)

26% I want to upgrade my current item

24% I wanted to treat myself

24% Replaced and old device that was lost or broken

12% Wanted to try out a new brand or product

Importance of having the latest tech

27% Not important	56% Moderately	18% Very or extremely

Preferences

61% are looking for **deals or price promotions** at the time of purchase. **44%** are looking for the c**heapest option**.

63% are looking for **a new model, 52%** are looking for **specific features**

68% Are looking for a **well known** or **trusted** brand, 61% want **previous brand experience**

58% Form as well as function, **58%** are looking for a specific **design or appearance**

Brand Consideration

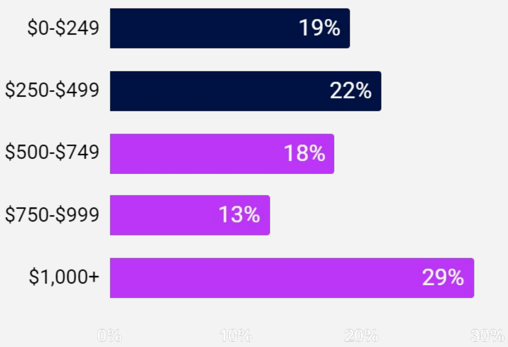
45% Consider only 1 brand

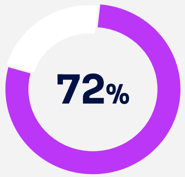
35% -2 or more brands

17% had no brand in mind

Sony	Samsung	LG	Google
18%	18%	10%	8%

Spend





Confidence in purchasing this category

Purchase Channels

60% Retail store *(e.g Myer, JB Hi-Fi)*

14% Retailer Website

9% Online Marketplace (Amazon)

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Significantly above average compared to all buyers

What are their Moments that Matter?

Average Journey Duration: 12.0 days

Passive Awareness → Active Awareness → Consideration → Decision → Execution

	Moment 1	Moment 2	Moment 3
Affect	**Activate** Use offers, promotions and advertisements to trigger action.	**Compare** Comparing different product features, prices warranties and as well as looking at reviews	**Confirm** Deliver reassurance on choice and value, and focus on after sales support to build confidence in the purchase decision.
Sources of Influence	Friends / colleagues/ own experience Social media (influencers/ experts) Adverts and video reviews	Friends / colleagues / own experience 3rd Party retailers and manufacturer (store/ Web) Price comparison and consumer review website Social media	Newspaper articles/tech section lift out Video reviews online 3rd Party retailers (store/ Web) Manufacturer Website/ store
What are they looking for?	1. Compatibility with other devices 2. Product reviews and ratings from other customers	1. Customer and expert product reviews and ratings 2. Technical specs and features 3. Warranty returns policies 4. Product testing and demonstrations	1. Expert reviews from tech publications 2. User manuals and guides for the product 3. Product sustainability impact 4. Warranty returns policies

Category Deep Dives

Mobile Phones

Category dynamics

High brand loyalty

The dominance of two major brands in the category streamlines decision making, with **pre-existing brand trust and preference** having a strong influence over consideration and purchase.

Upgrade tech and specs

High brand loyalty means consumers navigate within a brand. This means time is spent focusing on **specific features and specs** that can provide them the **best upgrade** to their current or previous device, and **across retailer** to compare **price.**

Hands on demos

Given the high category usage, **hands-on demonstrations** hold value allowing potential buyers to experience how the product fits into their routines and **complements existing devices.**

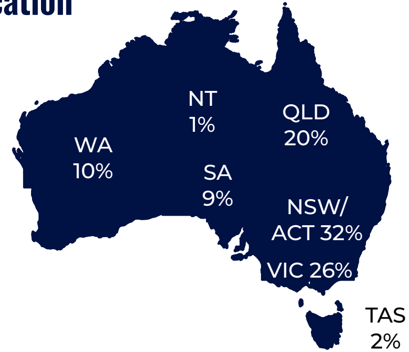
Who's buying?

52% Male
48% Female

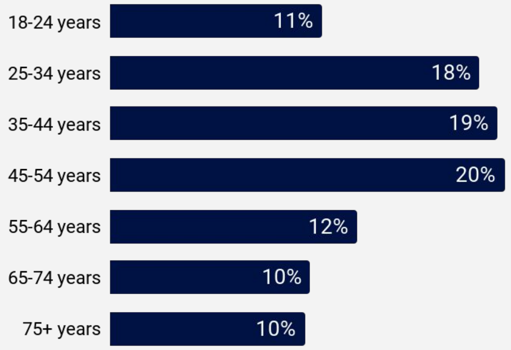
Average hh income of **$95,598**
43% Earn less than $60k

56% Working full or part time
20% retired

Location



Age



HH Profile

1in4 **Families** with children at home

1in5 **Single** person households

Category Attitudes

86% I believe tech has made communication easier and more convenient

83% Take precautions to protect their digital information

81% Believe tech improves productivity and efficiency in work and personal

76% Technology gives me more control over my life

75% Worried about invasion of privacy through new technology

74% Find technology is changing so fast it's difficult to keep up

63% Like to keep up to date with the latest technology

Significantly above average compared to all buyers

What are they looking for?

Triggers

41% Wanted to upgrade their current device (131ix)

40% I replaced an old device that was broken, lost, or stolen (126ix)

21% I wanted to treat myself

21% Saw an offer, promotion or advertisement

18% The device had a feature that I needed or wanted

Importance of having the latest tech

16% Not important	41% Moderately	43% Very or extremely

Preferences

69% are looking for a **well known/ trusted** brand. 65% want previous **good brand experience**

68% are looking for **ease of use or friendly interface**

66% Want to ensure **compatibility** with other devices

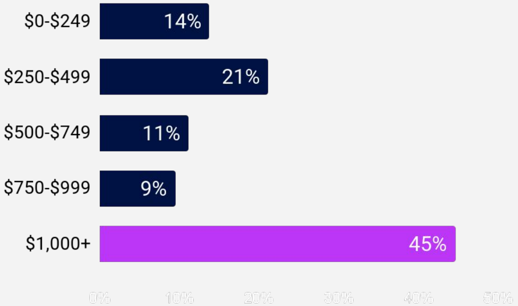
54% Want it to be available at **a specific store or online retailer**

Brand Consideration

68% Only consider **1 brand, 22%** consider 2-3

Apple	Samsung	Oppo	Google
42%	33%	7%	4%

Spend



90% **Confidence** in purchasing this category

Purchase Channels

31% Retail store *(e.g Myer, JB Hi-Fi)*

27% Telco Store *(Telstra/ Optus)*

12% Retailer Website

6% Telco Website *(Telstra/ Optus)*

6% Online Marketplace

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Significantly above average compared to all buyers

What are their Moments that Matter?

Average Journey Duration: 11.6 days

Passive Awareness → Active Awareness → Consideration → Decision → Execution

	Moment 1	Moment 2	Moment 3
Affect	**Activate** Activate upgrade desire by highlighting new features, capabilities and models	**Compare** Comparing different products, models and prices helps to determine the best fit for budget.	**Confirm** Hands-on experience and availability helps build confidence in the purchase decision.
Sources of Influence	Friends / colleagues/ own experience Social media (influencers/ experts) Adverts and video reviews	Reviews esp. video 3rd Party retailers (store/ Web) Price comparison website Manufacturer Website/ store	Asked sales assistant for advice Hands on demonstration of product 3rd Party retailers (store/ Web) Manufacturer Website/ store
What are they looking for?	1. New product features 2. Technical specs (camera quality, storage, battery life and memory)	1. Technical specs and features 2. Price comparisons across retailers 3. Customer and expert product reviews and ratings 4. Compatibility with other devices	1. Product demonstration/ hands on testing in store 2. Product stock and availability 3. Product warranty and return policies

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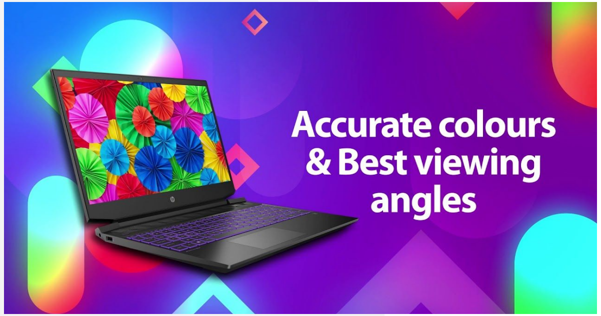
Category Deep Dives

Home Office

Includes: Computers (laptop and desktop), Tablets, Monitors, Printers and scanners

Category dynamics



Rational over emotional

Primarily driven by **functional needs** rather than emotional desires, resulting in a **lower** overall level of **excitement** and a greater **emphasis on rational considerations** throughout the journey.

Functional utility is key

Shoppers are more likely to consider the **practical aspects** of the products, such as their ability to fulfill essential tasks related to work, school, or hobbies. They **prioritize features and functions** such as memory, storage, processor speed, etc. that directly contribute to productivity and efficiency.

Reassurance and Ease

High reliance and usage means that shoppers seek assurance that the items will serve them well in the long term. Factors like **compatibility with existing devices** and **software, warranties**, and **after-sales support** influence the purchasing decision.

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Who's buying?

53% Male

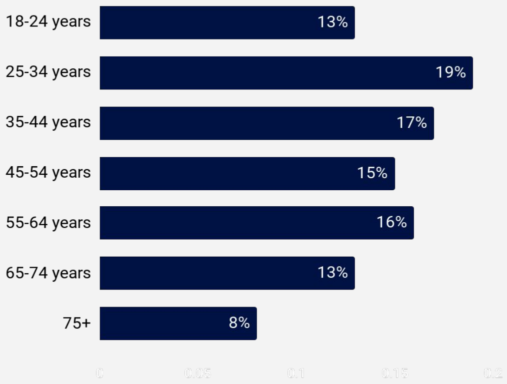
47% Female

Average hh income of **$92,617**

50% Working full or part time

23% retired

Age



HH Profile

1in4

Families with children at home

3in10

No children households, they're single or couples

Category Attitudes

89% I believe tech has made communication easier and more convenient

81% Believe tech improves productivity and efficiency in work and personal

79% Consider cybersecurity a top priority and take precautions to protect info

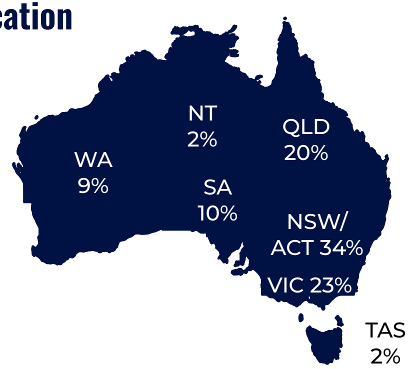
78% Worried about invasion of privacy through new technology

74% Technology gives me more control over my life

73% Find technology is changing so fast it's difficult to keep up

72% As long a product is functional, I don't care about brands

Location



Significantly above average compared to all buyers

What are they looking for?

Triggers

39% Replaced and old device that was lost or broken (124ix)

35% I want to upgrade my current item

30% Needed it for school, work or a hobby (192ix)

13% I wanted to treat myself

12% Saw a special offer or promotion

Importance of having the latest tech

20% Not important	52% Moderately	28% Very or extremely

Preferences

80% are looking for items **within their budget** a, **61%** want **deals or promotions** at time of purchase

72% Given the high usage, people want it to **easy to use** and have a **user friendly interface**

68% Want **warranty** or **return policy** to ensure I would be covered in case of any issues.

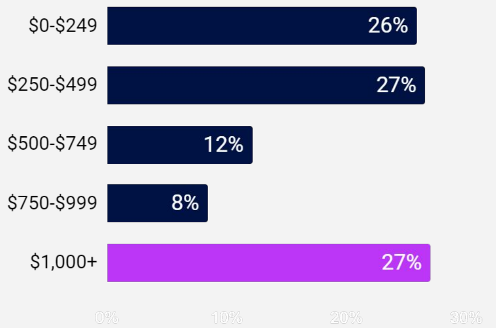
69% Want to ensure **compatibility** with other devices

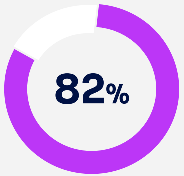
Brand Consideration

45% Consider **2 or more brands,** 39% only have **1 brand** in mind

HP	Apple	Lenovo	Epson	Canon
21%	15%	10%	10%	9%

Spend





Confidence in purchasing this category

Purchase Channels

57% Retail store *(e.g Myer, JB Hi-Fi)*

15% Retailer Website

9% Online Marketplace *(Amazon)*

4% Manufacturer's/ brand Website

3% Brand flagship store *(Apple store)*

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Significantly above average compared to all buyers

What are their Moments that Matter?

Average Journey Duration: 11.8 days

Passive Awareness → Active Awareness → Consideration → Decision → Execution

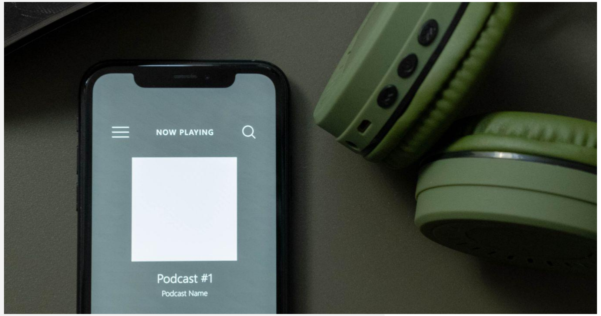
	Moment 1	Moment 2	Moment 3
Affect	**Activate** Highlight new feature and functions and their relevance for work/school or a hobbies, to encourage upgrade.	**Compare** Rational comparison of different product features, functions and compatibility, with use cases and expert reviews.	**Confirm** Deliver reassurance and ease of use with focus on after sales support to build confidence in the purchase decision.
Sources of Influence	Friends / colleagues/ own experience Social media (Tech influencers/ experts) Tech websites, magazines and content	3rd Party retailers and manufacturer (store/ Web) Price comparison/ consumer review website Reviews in news media and tech publications (print + online)	Friends / colleagues/ own experience In store dem 3rd Party retailers (store/ Web) Manufacturer Website/ store News articles/ tech lift outs
What are they looking for?	1. Reviews and ratings from other customers 2. Price comparisons 3. Specs, features and compatibility with others devices and software	1. Online video reviews, product reviews 2. Price comparisons and warranties 3. Specs, features and compatibility with others devices and software 4. Brand reputation	1. Customer service and support options from manufacturer or retailer 2. Online forums or discussion groups related to product 3. Warranty and return policies as well customer support

Category Deep Dives

Personal Tech

Includes: Headphones, Bluetooth speakers, Smart watches and Fitness Trackers

Category dynamics



Short purchase journey

Almost half of all purchase journey happen in under 2 days, which means speed is often a key factor. **Prompt delivery and product availability** can influence the decision to make a purchase.

Compatibility is crucial

Given the accessory nature of the products **compatibility with their devices and operating systems** is a key decision making factor. Similarly **connectivity options** like Bluetooth and wireless capabilities are important for ease of use.

Ease is desired

The product's features, **performance, and capabilities** are critical factors in the decision-making process. In particular people look for products that are **easy to use** and integrate into their daily lives.

THE growth DISTILLERY

Who's buying?

49% Male

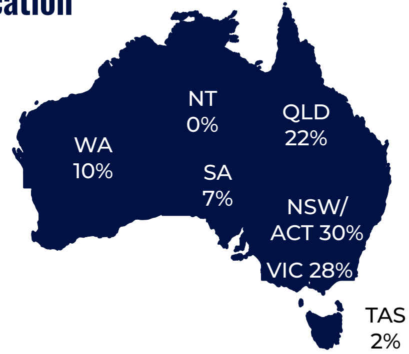
51% Female

Average hh income of **$86,438K**

61% Working full or part time

13% Retired

Location



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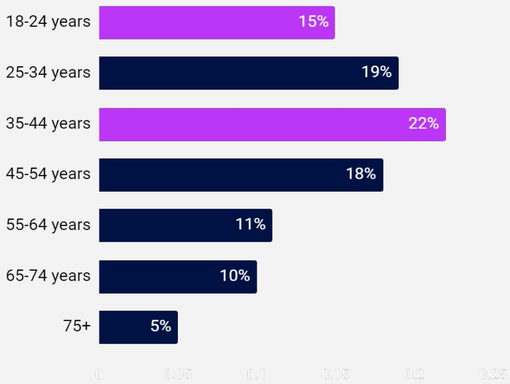

HH Profile

1in10 **Shared** living arrangements with other adults

3in10 **No children** households, they're single or couples

Category Attitudes

91% I believe tech has made communication easier and more convenient

87% Consider cybersecurity a top priority and take precautions to protect info

86% Believe tech improves productivity and efficiency in work and personal

77% Worried about invasion of privacy through new technology

76% Technology gives me more control over my life

73% Find technology is changing so fast it's difficult to keep up

66% As long a product is functional, I don't care about brands

THE growth DISTILLERY

Significantly above average compared to all buyers

What are they looking for?

Triggers

34% Replaced and old device that was lost or broken

29% I wanted to treat myself (129 ix)

24% I wanted to upgrade my current item

19% I needed it for a specific activity or hobby (219ix)

17% I saw a special offer or promotion

Importance of having the latest tech

28% Not important	51% Moderately	21% Very or extremely

Preferences

84% Want it to be **compatible with other devices**, the number one consideration

79% Want it to **easy to use** and have a **user friendly interface** to get using quickly

61% People want the product quickly – **easy accessible or convenient delivery, 50%** want to get it at a **specific retailer**

61% Would like the product to have **good reviews or recommendations**

Brand Consideration

43% Consider **2-3 brands**

38% only consider **1 brand, 14%** have no brands in mind

Apple	JBL	Sony	Bose	Fitbit
20%	14%	9%	7%	7%

Spend

$0-$249	63%
$250-$499	24%
$500-$749	9%
$750-$999	2%
$1,000+	2%

77% **Confidence** in purchasing this category

Purchase Channels

47% Retail store *(e.g Myer, JB Hi-Fi)*

15% Retailer Website

12% Online Marketplace *(Amazon)*

4% Manufacturer's/ brand Website

3% Telco store *(Telstra/ Optus)*

THE growth DISTILLERY

Significantly above average compared to all buyers

What are their Moments that Matter?

Average Journey Duration: 10 days

Passive Awareness | Active Awareness | Consideration | Decision | Execution

	Moment 1	Moment 2	Moment 3
Affect	**Activate** Buy now call to actions and drive desirability of product to encourage treat purchasing or upgrading.	**Compare** Comparing different product features, real world use cases, price and the ease and compatibility with other devices	**Confirm** Physical demonstrations, availability and user experience confirm the final purchase decision.
Sources of Influence	Friends / colleagues/ own experience; Reviews or social media recommend ations; 3rd Party retailers websites	Video reviews online; Social media (influencers/ experts); Price comparison/ consumer review website; Reviews in news media and tech publications (print + online)	In store demo; Manufacturer Website/ store; Newspaper articles/tech section lift out; 3rd Party retailers & ask sales assistant
What are they looking for?	1. Reviews and ratings from other customers 2. Price comparisons 3. Compatibility with others devices and software	1. Product reviews and price comparisons 2. Compatibility with other devices/ software 3. Manufacturer specification and features 4. Expert reviews and comparisons from technology publications and websites	1. Expert reviews and comparisons from technology publications 2. Product warranty and returns 3. Customer service and support options 4. User manuals

THE growth DISTILLERY

Category Deep Dives

Hair Care

Includes: Straighteners, Curling Irons,Hair Dryers and Hair Stylers
(all valued at more than $250)

Category dynamics

Influential shoppers

Shoppers are predominantly, young, high income females looking to treat themselves. **Endorsements** from **influencers, celebrities, beauty experts or friends** can heavily influence purchasing decisions in this category. **Fashion and beauty trends,** driving desire for innovative and stylish designs.

Reassurance and trust

Lower overall knowledge about the category and technology of the products, means that shoppers rely on **positive peer reviews, recommendations**, and **video demos/ hands-on testing** to gain trust and confidence in the products. **Warranties and return policies** also provide an extra layer of security in their decision-making process.

Emotionally engaged

Shoppers in this category have **highest levels of excitement** and biggest increase throughout the purchase journey. They are eager to extend this excitement post purchase looking for **tutorials, user manuals or guides** to help them engage with their product.

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Who's buying?

31% Male

69% Female

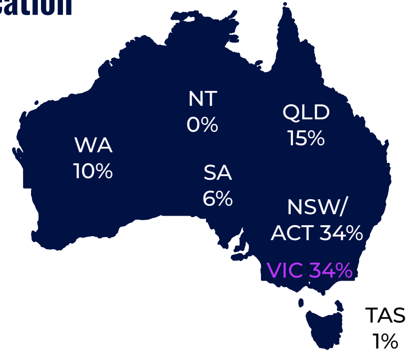
Average hh income of **$101,854**

25% have more than $150k

76% Working full or part time

4% Studying

Location



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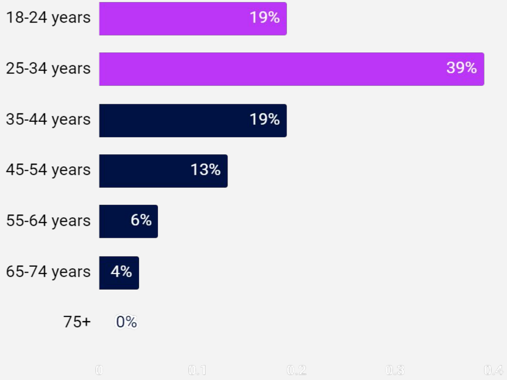


HH Profile

1in3

Families with children at home

1in5

Living at home with parents or other family

Category Attitudes

91% I believe tech has made communication easier and more convenient

90% Believe tech improves productivity and efficiency in work and personal

86% Consider cybersecurity a top priority and take precautions to protect info

82% Technology gives me more control over my life

76% Worried about invasion of privacy through new technology

73% Like to keep up to date with the latest technology

72% Enjoy using wearable technology to track health and fitness goals

Significantly above average compared to all buyers

What are they looking for?

Triggers

34% I wanted to treat myself (152ix)

30% I want to upgrade my current item

30% Saw and advertisement, offer or promotion (122ix)

22% Saw a new product/ brand and wanted to try it (143ix)

15% Friends or family own this and it made me interested (143ix)

Importance of having the latest tech

17% Not important	48% Moderately	35% Very or extremely

Preferences

74%
Will be swayed by good **reviews/ recommendations,**

70%
Want ease of use and **comfortable to use**, 13% are triggered by the want for a more **ergonomic** product

72%
Want a **warranty or return policy**, specifically as 10% of all purchases are a **gift from someone else.**

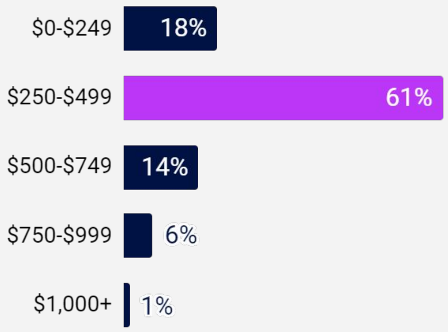
79%
Look for a **well-known/ trusted brand**, 65% want previous **good brand experience**

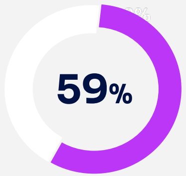
Brand Consideration

51% Consider **2 or more brands,** 38% only consider **1 brand**

Dyson	GHD	Cloud 9	Remington
43%	17%	6%	5%

Spend





Confidence in purchasing this category

Purchase Channels

47% Retail store *(e.g Myer, JB Hi-Fi)*
21% Retailer Website
9% Manufacturer's/ brand Website
5% Online Marketplace *(Amazon)*
5% Shoppable content/ Ad

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Significantly above average compared to all buyers

What are their Moments that Matter?

Average Journey Duration: 13.9 days

Passive Awareness → Active Awareness → Consideration → Decision → Execution

	Moment 1	Moment 2	Moment 3
Affect	**Activate** Show product usage and outcomes to drive excitement, desire and demonstrate value of the product.	**Compare** Comparing prices to ensure the best deal, exploring expert advice to build conviction in the value and use of the product.	**Confirm** Hands-on product demonstration/ experience helps build confidence in the purchase decision.
Sources of Influence	Video reviews online; Friends / family and colleagues; Social media (influencers & experts) & recommendations	3rd Party retailers & ask sales assistant; Price comparison on websites; Manufacturer Website/ store; Reviews in news media as well as magazines	In store product demo; Manufacturer Website/ store; 3rd Party retailers (store/ Web); Ask sales assistant
What are they looking for?	1. Reviews and ratings from other customers 2. Video product demonstration or hands on testing 3. Expert reviews and usage scenarios	1.Product reviews and ratings from other customers 2. Price comparisons 3. Product availability 4. Online forums and discussions 5. Usage scenarios	1. Video product demonstration or hands on testing 2. Price comparison across different retailers and marketplaces 3. Warranty and return policies 4. User manual, product guides

THE growth DISTILLERY

Category Deep Dives

Floor & Environmental

Includes: Stick Vacuums, Robot Vacuums, and Air Purifiers
(all valued at more than $250)

Category dynamics

Brand dominance

The dominance and awareness of Dyson in the category means a **narrower consideration set** overall, often heavily influenced by **friends and family experience**. This leaves less dominant brands needing to fight harder for consideration.

First time buyers

1 in 5 of all shoppers are **first time buyers of the category.** They are open to **exploring different options** and are not yet committed to a specific brand, relying on **reviews and recommendations.** This presents an opportunity for brands to build a long term relationship.

Ergonomics and ease

Lower overall knowledge of the category, places added importance on **ease of use.** In particular **user-friendly products** that are easy to set up and **comfortable to operate** can influence decision making.

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Who's buying?

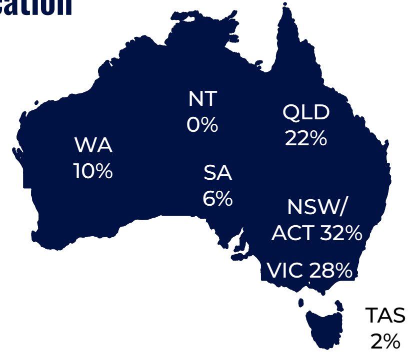
43% Male | **57%** Female

Average hh income of **$99,700**

64% Working full or part time

14% Retired

Location



Age

Age	%
18-24 years	10%
25-34 years	27%
35-44 years	21%
45-54 years	15%
55-64 years	14%
65-74 years	6%
75+	7%

HH Profile

1in3 **Families** with children at home

3in10 **No children** households

Category Attitudes

92% I believe tech has made communication easier and more convenient

86% Consider cybersecurity a top priority and take precautions to protect info

84% Believe tech improves productivity and efficiency in work and personal

78% Technology gives me more control over my life

77% Worried about invasion of privacy through new technology

70% Technology is changing so fast, it's difficult to keep up

62% Enjoy using wearable technology to track health and fitness goals

Significantly above average compared to all buyers

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What are they looking for?

Triggers

29% I want to upgrade my current item

28% Saw an offer, promotion or advertisement

27% Replaced and old device that was lost or broken

21% Needed device because I did not own it (175ix)

16% Friends or family own this and it made me interested (154ix)

Importance of having the latest tech

29% Not important	45% Moderately	26% Very or extremely

Preferences

74% Want ease of use and **comfortable to use**, 16% are triggered by the want for a more **ergonomic** product

71% Want reassurance, from **good reviews/ recommendations,** or (72%) from **warranty or return policy**

65% Are looking for a **well known** or **trusted** brand, 57% want **previous brand experience**

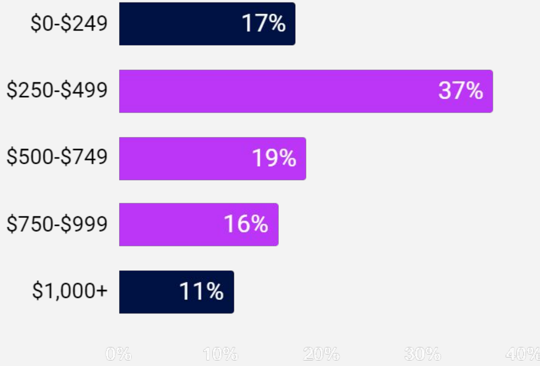
54% Want, the product to be **sustainable / energy-efficient**. **10%** say this is the initial trigger

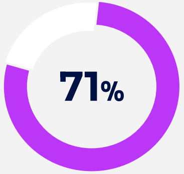
Brand Consideration

43% Only consider **1 brand, 42%** consider 2-3

Dyson	Samsung	LG	Roomba or Ecovacs
42%	5%	4%	3%

Spend





Confidence in purchasing this category

Purchase Channels

50% Retail store *(e.g Myer, JB Hi-Fi)*
18% Retailer Website
8% Online Marketplace *(Amazon)*
5% Manufacturer's/ brand Website
4% Manufacturer/ Brand Store *(e.g Dyson store)*

Significantly above average compared to all buyers

What are their Moments that Matter?

Average Journey Duration: 8.1 days

Passive Awareness → Active Awareness → Consideration → Decision → Execution

	Moment 1	Moment 2	Moment 3
Affect	**Activate** Highlight new features or promotions to activate first time purchase or replacement /upgrade of old product.	**Compare** Understanding the specs and features to meet their specific needs, the ease of use and product/brand performance.	**Confirm** Hands-on experience and talking to salespeople helps build confidence in the purchase decision.
Sources of Influence	Friends / colleagues/ Social media (influencers/ experts) Tech Websites TV shows and segments	Manufacturer website/ stores Price comparison/ consumer review sites Reviews in news media (print + online) In store product demo	Asked sales assistant Manufacturer Website/ store 3rd Party retailers (store/ Web) In store product demo
What are they looking for?	1. Product reviews and ratings from other customers 2. Price comparisons 3. Expert reviews	1. Product reviews and ratings 2. Manufacturer specifications and features 3. Usage scenarios 4. Product demonstration 5. Brand information/ Sustainability	1. Warranty and return policies 2. Product availability, shipping options and times 3. Customer service and support from manufacturer or retailer 4. Product demonstration 5. User manual, product guides

THE growth DISTILLERY

Early Adopters

Understanding early adopters, who are they, what makes them distinct, and how to win with them.

Early adopters skew male, younger and well off

52% Male

47% Female

18-24 years	22%
25-34 years	33%
35-44 years	24%
45-54 years	12%
55-64 years	4%
65-74 years	4%
75+	1%

More likely to be

- **Working full time**
- **Highly educated** - Postgraduate university degree
- **Higher household income**
- **SINKS/DINKS, families**, Living at home

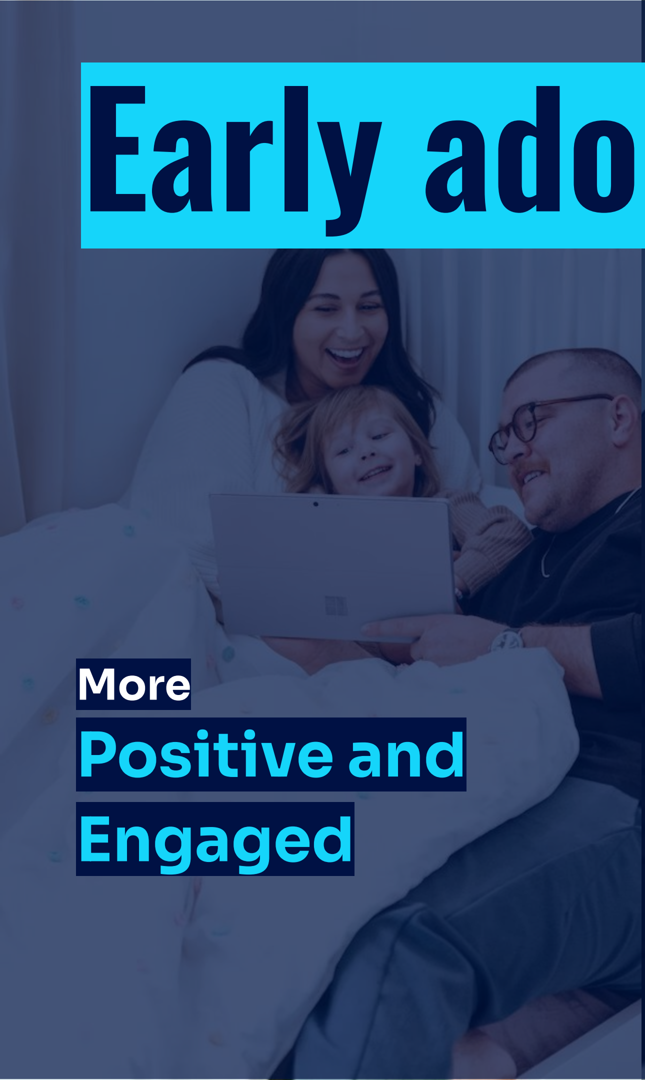
But this is not true of all tech categories

Home care and **mobile** early adopters skew slightly more female

Personal Grooming early adopters are both younger and female - **70%** are female and **64%** are under 34

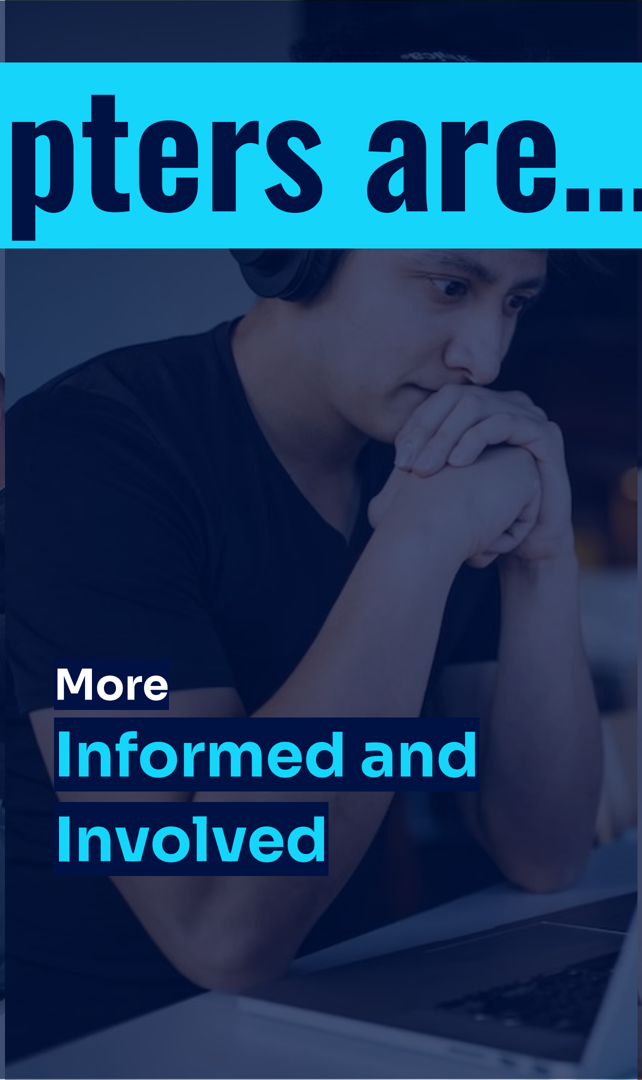
Home Office skews much more male - **62%** of early adopters are male

Early adopters are....



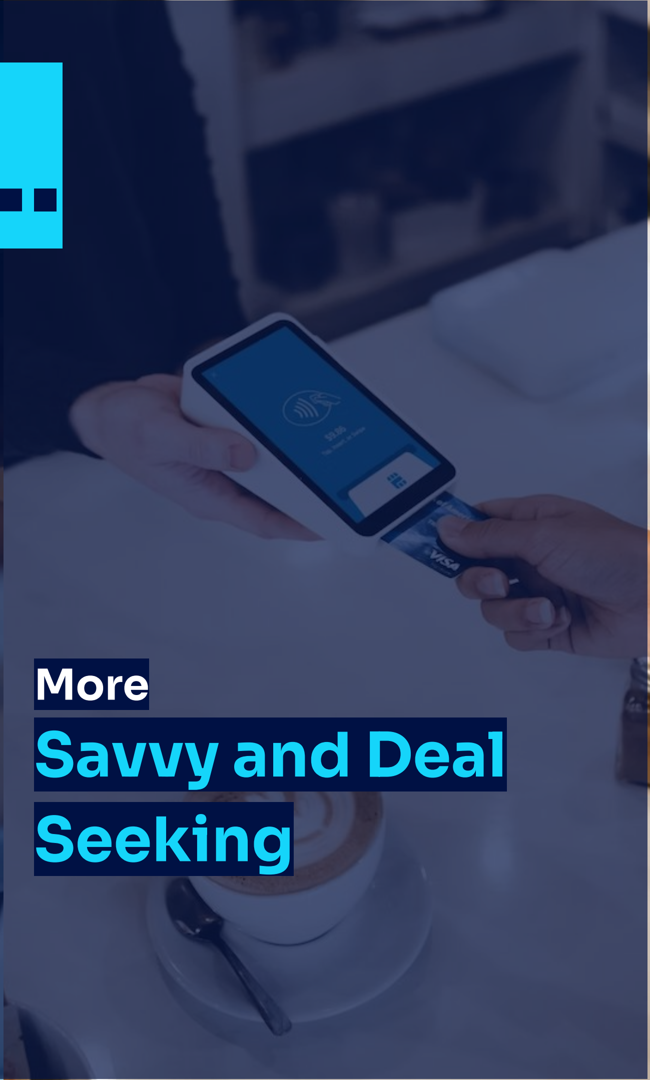
More

Positive and Engaged



More

Informed and Involved



More

Savvy and Deal Seeking

More Positive and Engaged

Tech plays a strong positive role in their lives

Early adopters generally have a more positive outlook on life, they're more happy and optimistic.

They have a **strong functional and emotional engagement with the category,** and believe that tech improves productivity, efficiency and provides more control over their lives as they themselves are tech savvy.

2x
More likely to strongly agree they consider themselves as technology savvy

90%
Agree tech improves productivity in work and social life

82%
Like to keep up to date with technology

More informed and involved

They have a depth of knowledge built from engaging with informed points of view

2-3

Brands are considered by early adopters at the beginning which is more than average.

Early adopters tend to have a wider consideration set, and as they want to keep up to date with the latest in tech, they're more likely to seek out a variety of peer and expert points of view. Their **top sources of information are reviews (video in particular), tech websites, social media influencers experts and third party and retailer stores and websites.**

More savvy and deal seeking

They are willing to pay a premium, but they want their money's worth

75%

are willing to pay a premium price for high-quality tech products - but **want their money's worth**, and are more open to spending more if the product is right than general intenders

Happy to shop around - More likely to have visited more than one store before visiting to make a purchase (41% vs 34%, index 123ix), and before making a purchase 29% vs 25% average 118ix

Focused on the extras – interested in a loyalty programs, warranties, and are more concerned with it being easy to return or exchange.

Want to get the most out of the product – They index higher on HOW they can use the product i.e user manuals, product usage scenarios/case studies all help them to get the most out of their item

Consider environmental factors: They also index higher in being concerned about environmental impacts more so than the average consumer.

Active purchase journeys may be shorter, but they are thinking about the products for longer

Early adopters have **longer intender periods** - 2-6 months on average. 1 in 4 (24%) say they have been considering the for the last 7-12 months

Despite these longer intender periods, once they're ready the purchase journey is 5x shorter.

45%
More likely to be waiting for a **product to be updated or improved** before purchase

43%
More likely to want to **stay up to date** with the latest tech trends

22%
More likely to be **waiting for a new version or model** to be released

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To win with early adopters, we need to...

Passive Awareness → Active Awareness → Consideration → Decision → Execution

What to do

Moment 1
Activate
Drive excitement and desire by highlighting new products, innovation & features

Create a sense of exclusivity and anticipation with pre-launch teasers, sneak peeks, and demonstrations showcasing cutting-edge features and functionalities.

Moment 2
Compare
Demonstrate and prove the value of the product, and the positive impact it can have in their lives.

More than just techs and specs, brands need to show what they can do in real life situations, demonstrating how the product can be used to its full capacity.

Moment 3
Confirm
Deliver post purchase value to create stickier relationship and brand advocacy.

Benefits, rewards and warranties help to deliver greater value, whilst user manuals, product usage scenarios/case studies help them to get the most out of their product post purchase.

How to reach them

Video Reviews
& magazines reviews and websites

Social media
(tech influencers, experts and enthusiasts)

Tech Websites
(Tech Radar, Wired)

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