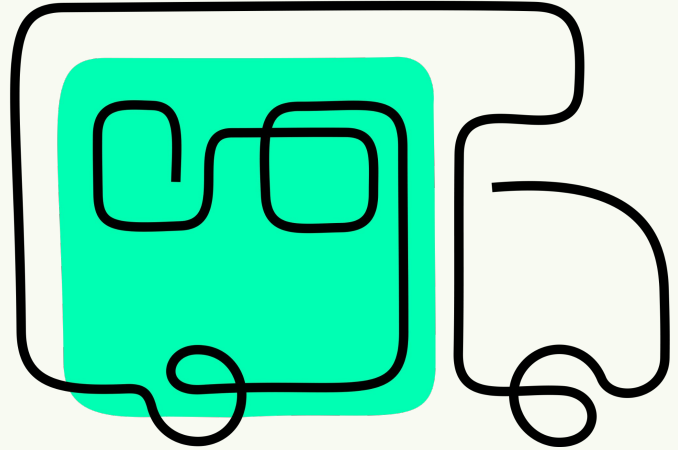


# Auto

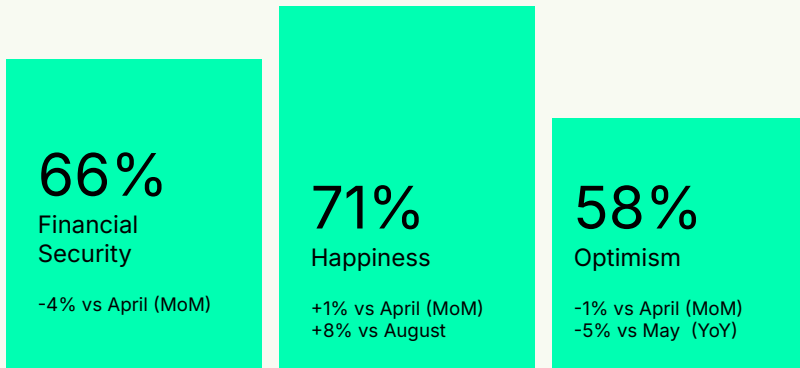
## Price pressure is stalling buyers. Fuel is changing what they choose.

Car-buying intention has hit a series low of 18% in May 2026, coinciding with record fuel prices, and with cost of living and price shock the top barriers to purchase.

The crisis isn't just stalling buyers, it's also impacting what they're planning to choose. Nine in 10 (89%) say rising fuel costs would shift the options they consider, with hybrid (36%), full EV and keeping their current car (both 23%) the clear frontrunners, a decisive move toward efficiency and electrification.



## Auto consumers are upbeat but becoming more financially cautious

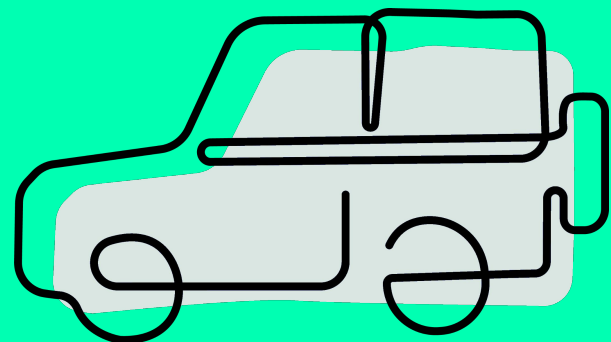


## They're generally more optimistic with their mood and mindset.

Car buyers are a more upbeat, confident audience, running well ahead of the average Australian on happiness (+10%), optimism (+17%) and financial security (+12%) though financial confidence has softened in the past month (-4%).

## The issues they care about...

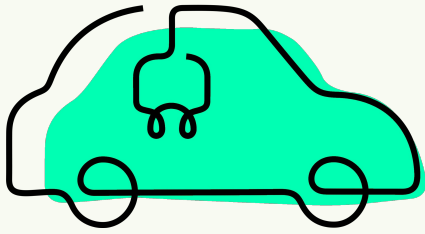
- 76% Housing affordability
- 67% Healthcare and access to medical services
- 65% Utility prices and regulation
- 64% Children's safety and bullying (+7% non car buyers)
- 62% Mental health and wellbeing (+7%)
- 60% Physical health and fitness (+6%)
- 59% Jobs and employment opportunities for Aussies (+11%)



## What this means for Auto

➤ Car buyers over-index most on jobs, children's safety and physical health, signalling that for this audience the car is a functional necessity first and foremost. **Brands that lead with safety, reliability and the practical demands of working and family life will convert far more effectively than those relying on aspiration alone.**

## Auto Category Behaviours



>18 %

### Car-buying intention drops

Active car buying intention has fallen to a series low of 18% in May 2026, down from 24% in February.

>33 %

### Demand is concentrated among young/growing households:

Active intention skews toward families with infants/preschoolers (33%) and primary aged kids (30%).

>30 %

### As well as high earning households.

After young families, intention is highest with homes of a \$150K+ income (30%).

## SUVs dominate as the most preferred car type to buy..



49%  
SUV



33%  
Sedan



18%  
Hatch or wagon



11%  
Ute



5%  
Van

## And popular fuel type shows electrified options now claim almost half of fuel intent ..



56%  
Petrol



29%  
Hybrid



18%  
Electric



18%  
Diesel

## Young families and high households encourage the popularity of SUVs and electrification.

The buyers still actively in market are well-defined and purposeful in what they want. Their preferences for family-sized vehicles and electrified fuel options are closely aligned with their life stage and household income.

### Top enablers for influencing auto decisions



- 60% Affordable
- 35% Engine size / performance
- 31% Safety rating
- 22% A brand you or your family has owned before
- 22% Warranty duration
- 21% Recommended by others

### Country of manufacture

Japan and Germany are the most desirable country of origin, but majority of buyers are not concerned with country of origin.

### Balancing desire & budget

Intenders are finding ways to get the vehicles they desire. Seeking value (33%) and discounts or deals (27%), or wait rather than abandon until they can afford the car they want (26%).

### Reliable & value define worth it

Value for money (45%), fuel efficiency (45%), reliability (44%) and performance (40%) make a car purchase feel "worth it".

### Top challenges when making auto decisions



- 46% Rising cost of living expenses
- 40% Price shock / more expensive
- 33% Insurance costs and coverage
- 25% Servicing and parts plans and/or costs
- 22% Interest rate increases

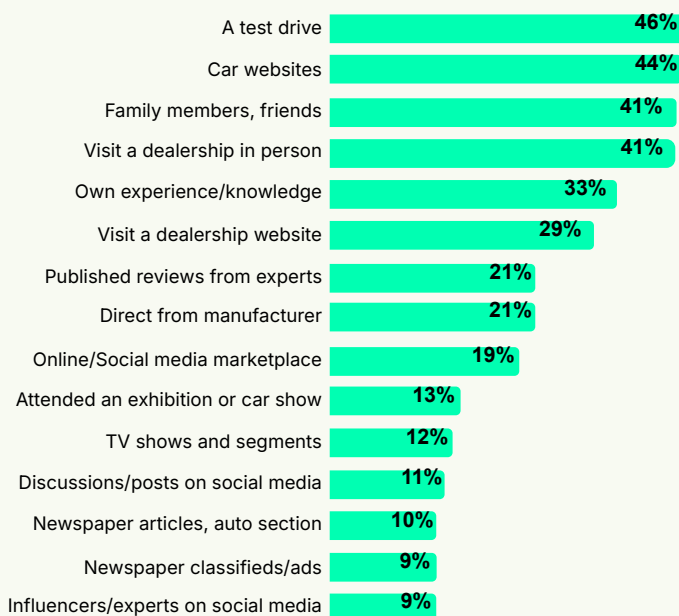
### Commercial Implication

Affordability is the biggest driver of auto purchase, but financial pressure is the biggest barrier. This creates a clear opportunity for brands, particularly Chinese manufacturers, to win on value for money, especially if they can build trust beyond traditional country-of-origin preferences.

# Record Fuel prices are changing how Australians drive and what they'll buy next.

- **The Price Spike:** After easing to a 14-month low in February, fuel prices surged a record 32.8% in a single month to an all-time high index of 125.3 in March 2026, the steepest monthly rise ever recorded.
- **How Drivers Are Responding:** 49% of drivers say they are already using their vehicles less, with 36% going out less often and 29% switching to public transport.
- **Impact on Car Buying Decisions:** Almost nine in ten car buyers say rising prices would shift what they consider buying, with hybrid (36%), full EV (23%) and keeping their current car longer (23%) the top responses.

## Sources of information for Auto



## Auto audiences are high value cross category consumers



65%

### Consuming Sports Content

65% consuming sports content (129ix), 32% wagering or betting on sport (179ix) and 29% playing fantasy sports (237ix)



67%

### Planning on taking a leisure trip

67% (142ix) taking a leisure trip (excluding business or single night stays).



68%

### Retail Shopping

68% buying new clothes and accessories (143ix), 61% buying beauty products (135ix) and 44% purchasing premium/luxury fashion (228ix)



62%

### Highly Tech Engaged

62% are purchasing or upgrading tech devices (184ix), 62% using AI tools eg. ChatGPT, Copilot (154ix).



57%

### Buying furniture, appliances, decor

57% purchasing furniture, appliances or decor (197ix), 39% buying a property to live in or invest (268ix), 16% undertaking renovations (212ix).

## Where food brands can unlock growth

### Reach the audience when life is accelerating.

Auto buyers are family-oriented, high-income and navigating major life milestones, making them one of the highest-value audiences in market.

- Target around family growth and life-stage triggers
- Show up in the moments tied to new homes, new jobs and new chapters
- Cross-category relevance builds trust well before purchase intent peaks



### Make efficiency the hero of the purchase conversation.

Buyers are weighing every cost: fuel, insurance, servicing and financing before they commit.

- Speak to utility, value and performance as a package
- Lead with total cost of ownership, not just sticker price
- Hybrid and EV messaging resonates most when framed around savings, not technology



### Make the personal experience count.

Some of the most influential moments in the buying journey are still face-to-face.

- Test drives and showroom visits remain the top conversion triggers
- Family members play a key role in the final decision
- Auto shows and live brand experiences create advocacy that advertising alone cannot