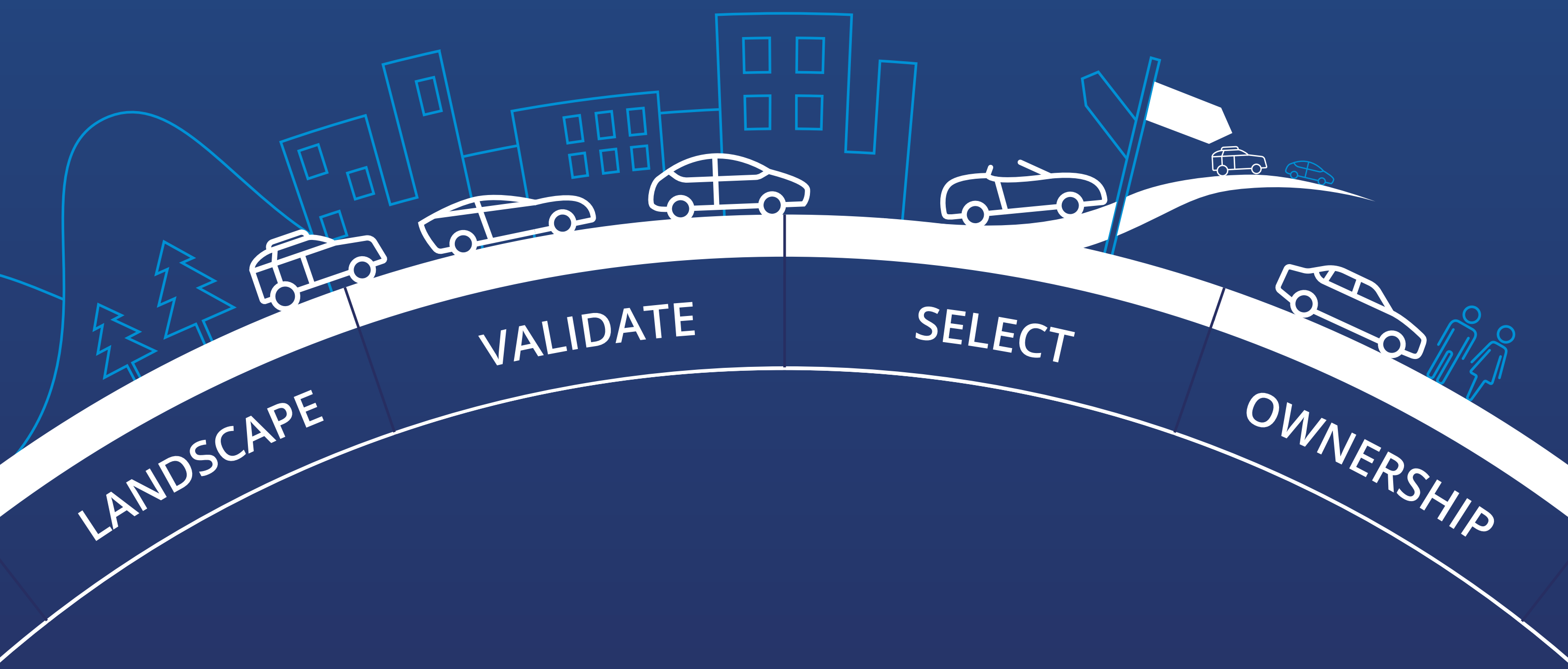
carsales presents: Auto Futures

THE JOURNEY TO VEHICLE OWNERSHIP



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EXECUTIVE SUMMARY

1 In 2017 carsales.com.au engaged Ipsos to revisit their 2013 study, bringing the car buying journey to light for the Australian marketplace. The intention of the new study is to explore, 4 years on, what the journey to vehicle ownership looks like now - what's changed, what's stayed the same, and what the automotive future looks like for consumers.

2 This new research uncovers that consumers experience 4 distinct stages on their path to purchasing a new vehicle—one fewer than in 2013—and that digital media plays a crucial role throughout their journey to vehicle ownership.

3 Digital sources are used to research and cross reference information, as well as to gain a broad understanding of the market. Buyers in 2017 do a considerable amount of research online before even stepping into a dealership, and feel much more confident as a result.

4 The dealership experience plays a role as a key resource for consumers earlier in the purchase journey than it did in 2013. Consumers are seeking tactile experiences that cannot be realised through their digital channels, and dealership experiences can help fulfil this need.

5 Once buyers commit to a purchase they still have a strong need to validate their decision, using digital resources to post-rationalise their purchase.

6 The majority of consumers are open to a future where they can conduct the entire car buying journey online, with current confidence levels in transacting online high. However the desire for a physical experience with the vehicle still needs to be fulfilled.

7 Consumers are curious but cautious when it comes to advances in automotive technology, such as electric and autonomous vehicles. They want to be armed with much more information before they will embrace these new technologies.

INTRODUCTION

The relationship we have with our car is significant, and the journey to purchasing a new vehicle is a careful balance of the functional and emotional needs of the buyer. Although functional requirements, emotional desires and budgets differ from buyer to buyer, the heart of the matter remains constant, as buyers search for a worthwhile purchase that fits their circumstances.

For most consumers, purchasing their next vehicle is a major decision which involves careful thinking and due diligence to ensure that they are purchasing a vehicle which not only satisfies their lifestyle needs, but also one that suits their financial requirements. However, with over 58 car brands to choose from, finding the best suited vehicle can be overwhelming.

In 2013 carsales.com.au commissioned independent research company Ipsos to bring the car buying journey to light for the Australian marketplace. In 2017, with changes in the purchase journey brought on by the continued rise of digital, carsales.com.au engaged Ipsos to revisit the auto buyer journey 4 years on. It was important to gauge what's changed, what's stayed the same, and what the automotive future looks like for today's car buyers.

This research attempts to navigate this new buying landscape; one that is ever more cluttered and competitive, and one where consumers can arm themselves with information via multiple digital channels before ever stepping foot in a physical showroom.

Auto Futures: The Journey to Vehicle Ownership 2017 addresses the following questions;

→ What triggers start consumers on their path to vehicle purchase?

→ What sources do consumers rely on along the way?

→ What are the biggest influences at each stage?

→ How does the 2017 journey compare to the 2013 journey?

→ What role do finance and insurance play?

→ What does the future of automotive look like to today's car buyers?

THE JOURNEY MODEL

As consumers move through their vehicle journey, they consider their needs and wants, and evaluate which options in the market can best meet them.

They may begin their journey with preconceived ideas and brand preferences, but due diligence is undertaken on the path to buying a new car to ensure that the vehicle chosen meets the criteria that buyers have outlined for themselves.

Each stage of the purchasing journey, the emotions experienced, and the key sources consulted - people, media and activities – are detailed in the following pages.

THE JOURNEY TO VEHICLE OWNERSHIP 2017

PRE-TRIGGER

The pre-trigger consists of the lead-up time before the decision to purchase a new vehicle is made. For some consumers, this pre-trigger period could take months or years, whereas for others this stage can be extremely short, especially if they are forced into the decision due to an adverse event, such as a car accident or breakdown.

The trigger that propels consumers into the vehicle purchase journey plays a major role in determining both the length of time and the amount of frustration or anticipation that consumers encounter throughout the journey. Sudden events create a greater the sense of urgency and pressure, and increase the likelihood of frustration being experienced. Fortunately for most however, the key trigger to purchasing a vehicle is driven by a desire for change - something newer or better that fits their current lifestyle.

Whatever the circumstances, the milestone of making the decision to buy indicates the end of this phase, and a step forward on the path to purchase.

Triggers for purchasing a new vehicle

10% I regularly update my car

10% I just want a new car

9% My family is expanding

9% I want a car with new features / better performance

7% I need a bigger car

STAGE 1
LANDSCAPE

LAY OF THE LAND

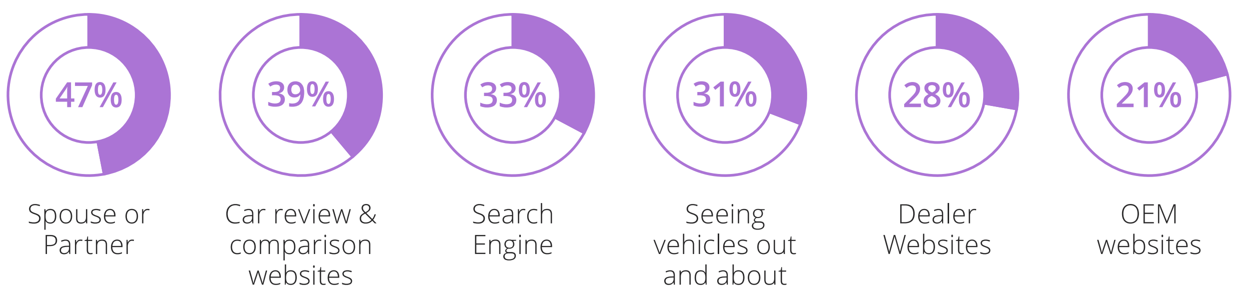
Time in stage – 1 month

Consumers who enter the Landscape stage have made the decision to purchase a new car, and are attempting to establish a general understanding of the car market and the full range of options available to them. Buyers start to figure out their needs based on how they intend to use the vehicle and who will be using it, and research begins to explore which cars in the market can best meet their requirements. They may commence with broader searches on cars they see acting as a source of inspiration and a baseline to start from.

For most, the vehicle buying journey begins positively - there is a sense of trust that they will find something that is suitable. Car buyers want to be inspired by what's available, and how it could fit their lifestyle needs. At this stage the focus is about how consumers feel rather than pure logic, although for some it's a combination of both.

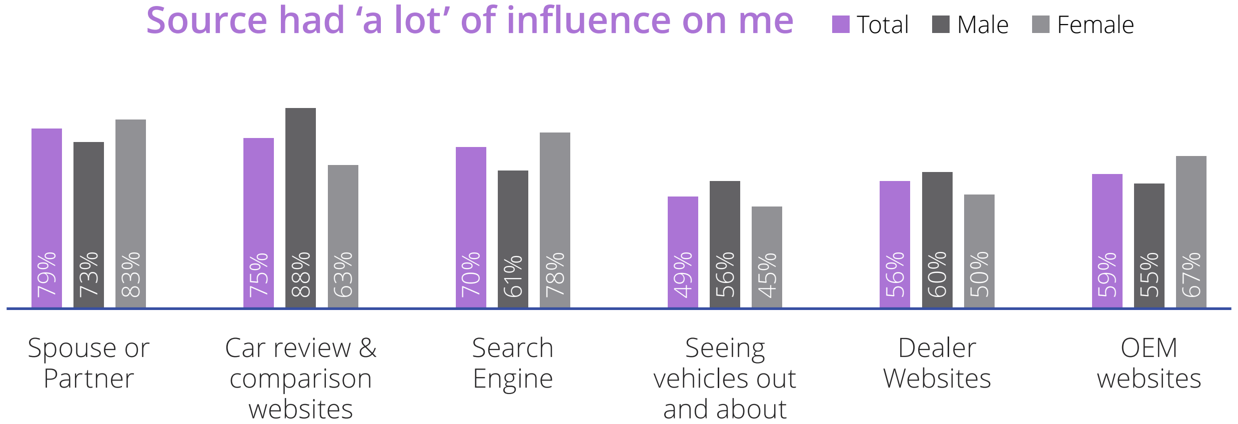
Obtaining information is the key to getting a better understanding of the vehicle landscape. The top sources consulted during the Landscape stage are spouse/partner, car review & comparison websites and search engines. Seeing vehicles out and about, as well as dealer and manufacturer websites also help consumers to get sense of what's available.

Top 6 Sources Consulted - Landscape



As well as being the most popular sources consulted in the Landscape stage, consumers indicated that their spouse/partner, car review & comparison websites and search engines also had the most influence on their decisions during this phase of the journey.

Source had 'a lot' of influence on me



Once consumers understand the basic automotive landscape and their own parameters, they can move through to the next stage of establishing a shortlist of vehicles to be considered.

STAGE 2
VALIDATE

CREATING A SHORTLIST

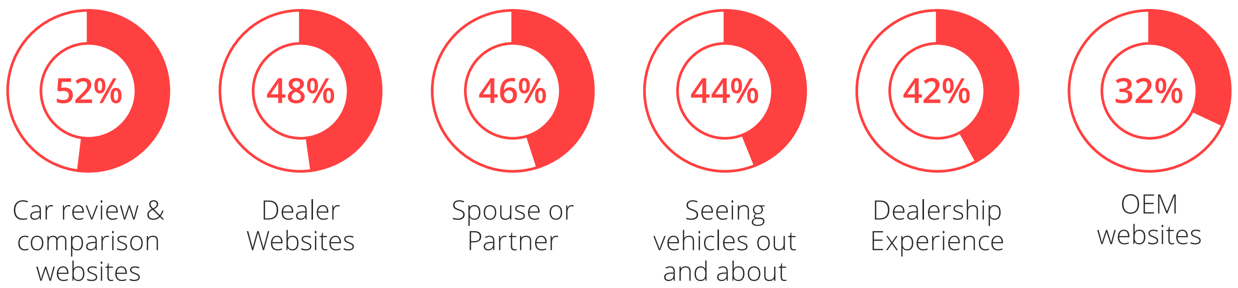
Time in stage – 1 month

As buyers develop a better understanding of the marketplace, their needs, and what vehicle options are available, they begin to eliminate options that don't suit them, and identify those that do to create a shortlist of vehicles for a more detailed comparison. The objective of the Validate stage is to be able to narrow down the search to a shortlist of vehicles that they can seriously consider.

Buyers are still looking to be inspired about their considerations and choices, but the need to be informed increases at this stage. The emotional elements remain, but the focus does shift towards a more rational approach to refining the options.

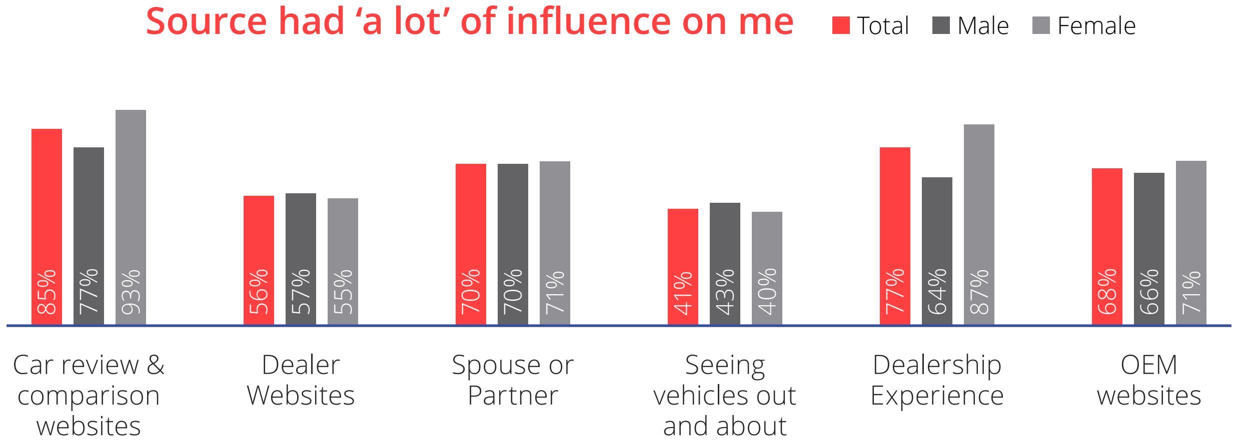
Independent car review & comparison websites lead the way as the top source of information during the validate stage, followed by dealer websites and spouse/partner. We also see the dealership experience coming in to play as a key resource at this stage, appearing much earlier than it did in 2013; the first indication that consumers may be speeding up their buying journey.

Top 6 Sources Consulted - Validate



Car review & comparison websites have the most influence at this stage, followed by the in-store dealership experience, and spouse/partner. Dealers who provide a great customer experience at this stage of the journey may set themselves up to be the preferred choice when the decision to purchase is made.

Source had 'a lot' of influence on me



By the end of this stage, consumers will have compiled a shortlist of vehicles that they are seriously considering owning.

STAGE 3
SELECT

COMPARE & DEAL
Time in stage – 21 days

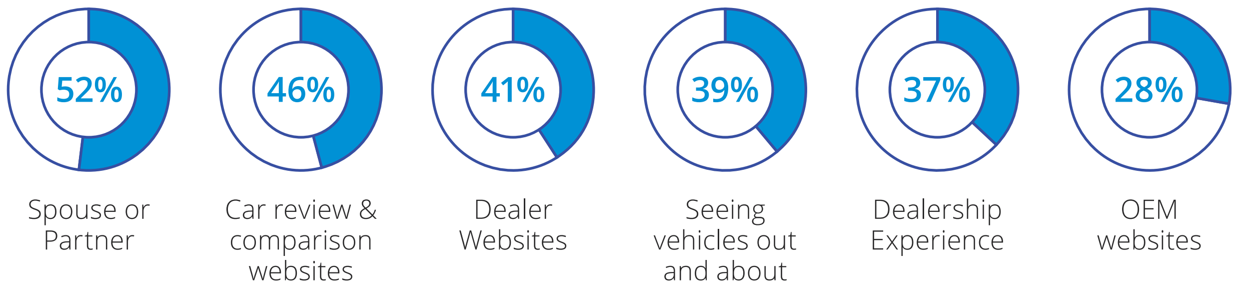
With a shortlist compiled, buyers are ready to review in more detail the vehicles in contention. They research more heavily about the specifics of their shortlisted vehicles - how do the vehicles stack up against one another, how well will they deliver on wants and needs, and what are the possible shortfalls.

The consumer has also prepared themselves for purchase at this point, so if they find a vehicle that's right for them they will proceed to buy without hesitation – sometimes without fully exploring their other shortlisted cars.

Inspiration remains important in this stage, and the need to be informed continues to develop. Buyers remain somewhat split between rational thinking and emotional feeling. Happiness and anticipation are experienced at this stage of the journey.

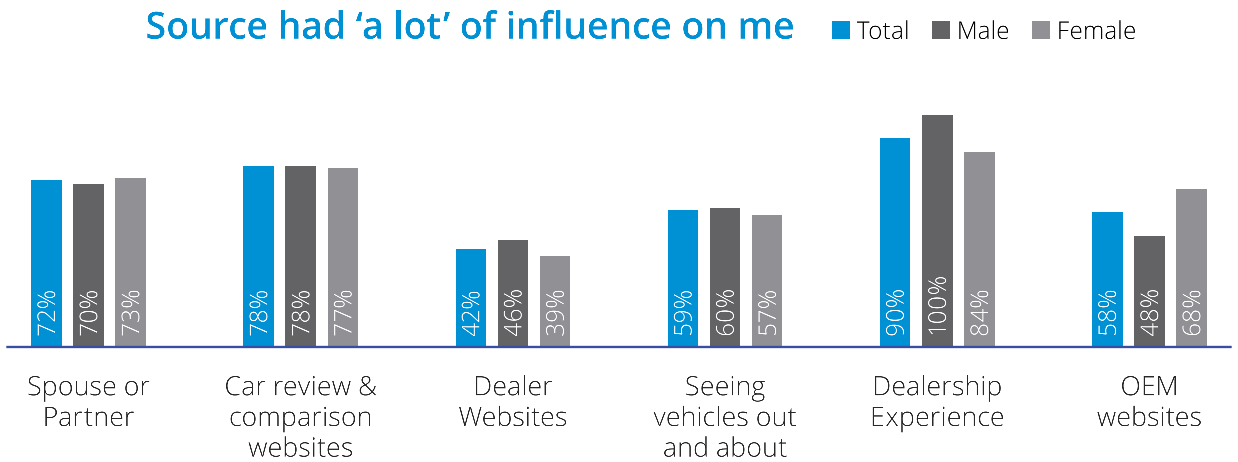
Along with advice sought from a partner, car review & comparison sites that support buyers in better understanding how vehicles measure up are a key resource at this stage. So too are dealership websites for locating and pricing stock, and dealership experiences, which are likely to encompass the actual purchase of the vehicle.

Top 6 Sources Consulted - Select



The dealership experience is highly influential for consumers at this stage of the journey, highlighting the importance for dealers to 'get it right'. Car review & comparison sites continue to be a big influence, along with spouse/partner.

Source had 'a lot' of influence on me



STAGE 4
OWNERSHIP

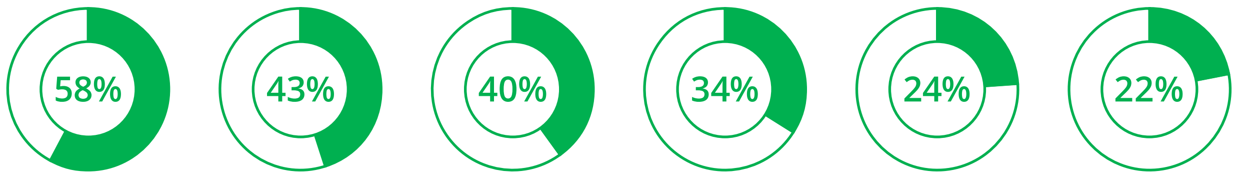
THE PRIZE

At this stage the consumer can celebrate and enjoy their purchase. They feel relieved that the journey has ended and optimistic that the vehicle will live up to their expectations. While most consumers claim they purchase their vehicle based on price, value or availability, consumers still feel the need to post-rationalise their purchase to ensure that they have made the right decision.

The need to be inspired continues to dominate as buyers familiarise themselves with their new vehicle. The focus is a still a balance of how consumers feel and their rational thinking, with core emotions of happiness, contentment and acceptance.

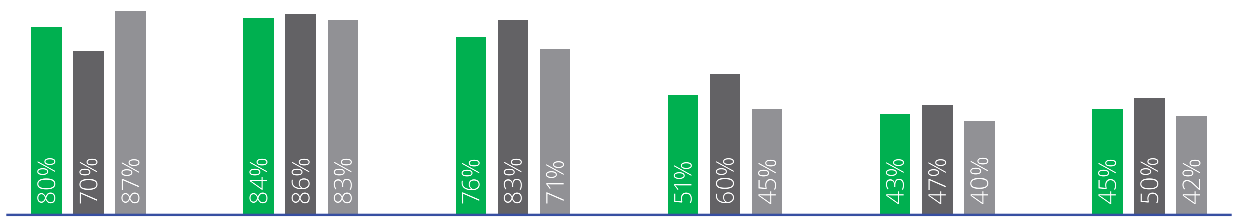
Car review & comparison websites are a particularly important resource at this stage as they not only offer a better understanding of the vehicle purchased, but can help validate the purchase decision. Dealerships are another key source, as buyers take delivery of their new car and dealers assist with vehicle set up, arranging the initial service, and answering any questions the buyer may have.

Top 6 Sources Consulted - Ownership



This stage can be an exploratory phase for the consumer as they familiarise themselves with their new vehicle. As such, car review and comparison websites continue to be a major influence enabling consumers to gain a better understanding of their chosen vehicle.

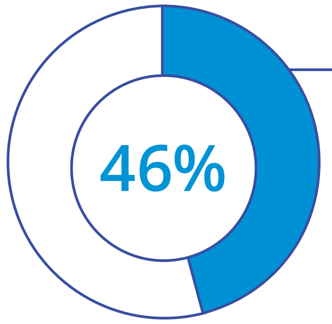
Source had 'a lot' of influence on me



HESITATIONS & BACKTRACKING

Buyers move through the purchase journey more quickly than they did in 2013, but their decision is no less considered now than it was then. Nor is it always a linear, one-way journey.

Almost 1 in 2 buyers paused or went backwards to re-evaluate their choices on their path to purchase in 2017.



Backtracked or paused at some point during their vehicle purchase journey

→ **25%** Stopped or Paused
→ **21%** Went backwards, started over or re-evaluated

The main reasons for backtracking include uncertainty over a new versus a used vehicle, a change in financial situation, and the influence of a car review or competitive comparison.

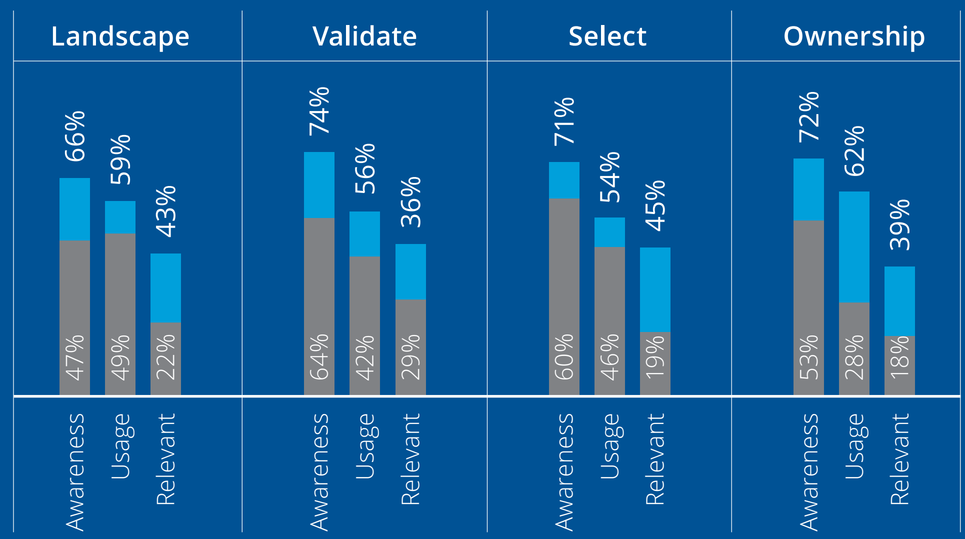
22% Unsure if they needed a new or used car
18% Change in financial situation
16% Review / Comparison changed their mind
16% Couldn't find a car they liked
13% New model announced
12% The car I wanted didn't work out for them

INTERACTION WITH CARSALES.COM.AU THROUGHOUT THE JOURNEY

carsales.com.au is a key and influential resource for car buyers in Australia. Car review and comparison websites are the leading media source of information across all stages of the purchase journey, from the moment consumers decide they need a new car all the way through to ownership. Of all car review and comparison websites, carsales.com.au is consistently the website or app that consumers are most aware of, used most, and said was the most relevant to them during each stage of the journey, holding a clear lead over its next competitor.

carsales vs closest competitor website - 2017

carsales
competitor



Seen as a 'whole of market' search engine, consumers view carsales.com.au as a complete digitised version of the car marketplace. It's a place where consumers can educate themselves on the car buying landscape, work out budgets, identify potential dealerships and validate their decisions.

2013 VS 2017 COMPARISON

In 2013 the Ipsos Journey to Vehicle Ownership entailed 5 distinct stages, and took consumers an average of 4.3 months from beginning to end. In 2017 the journey is compressed into just 4 stages, taking consumers an average of 2.7 months to complete.

The Landscape and Validate stages have remained constant across both studies, taking 1-month each to complete. However the Compare and Deal stages that we saw in 2013 have united into just one stage in 2017 – Select. Moving from a shortlist through to purchase, which previously took consumers more than 2 months to complete, is done in just 21 days in 2017 - a shortening in the overall journey of 48 days.

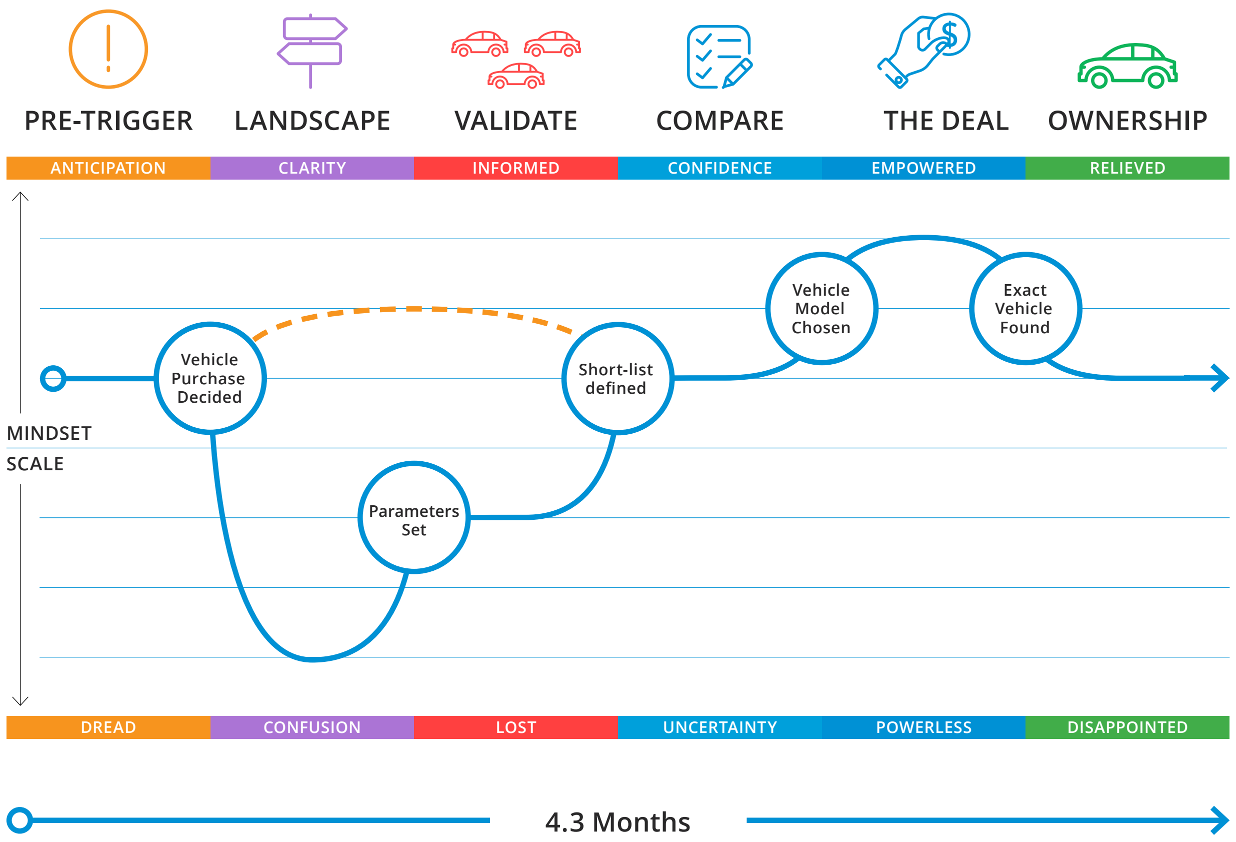
In 2013, with the exception of those 'auto experts' who fast tracked through the first two stages, consumers entered the car buying journey and immediately felt overwhelmingly confused and lost. It wasn't until mid-way through their journey that buyers started to have a more positive mindset, and began to feel confident and empowered.

By contrast, consumers in 2017 enter the landscape stage feeling much more clarity than their 2013 counterparts, and move through the journey feeling informed and confident throughout. Consumers appear to be well and truly in the drivers' seat throughout their path to auto purchase in 2017.

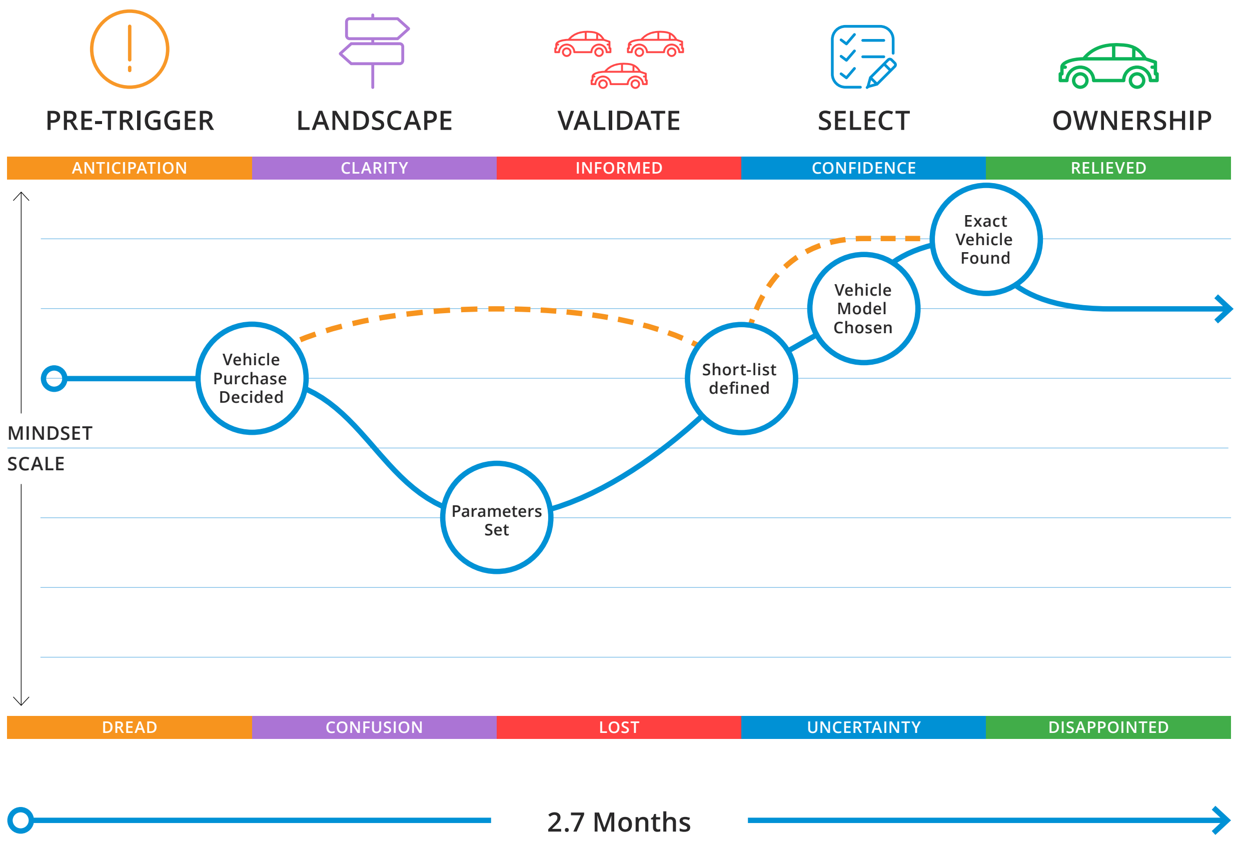
Our love affair with smartphones ensures that digital is an intrinsic part of our daily lives, and it's likely that this is behind this new bold and self-assured consumer. Digital audience measurement figures from Nielsen show that there are 3.7 million more Australians online now than there were in 2013, and that adult Australians spend in excess of 84 hours online each month - more than double the amount of time we did in 2013.

More so than ever before we are able to educate ourselves on any subject at the touch of a button, so when it comes to the auto purchase journey we no longer need to rely heavily on others for guidance and advice, but rather take control of our own journey, using the internet as our primary source of information.

The 2013 Purchase Journey



The 2017 Purchase Journey

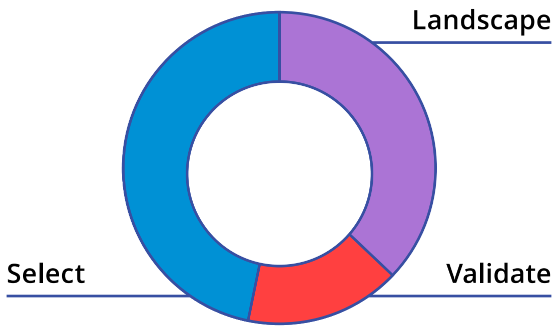


THE ROLE OF FINANCE & INSURANCE IN THE PURCHASE JOURNEY

FINANCE

44% of car buyers used finance to fund their automotive purchase. More than one third (37%) of buyers think about finance in the Landscape stage of their journey, with 16% doing so in the Validate stage, and the remaining 47% in the Select stage.

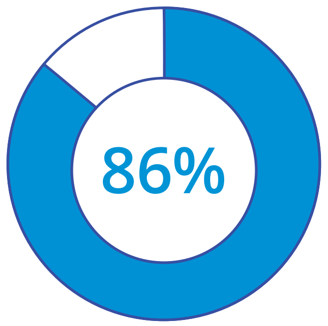
When do you think about finance?



The majority of buyers have a rough idea of their budget to commence with but are happy to increase it during the journey if they feel like they are getting a 'good deal'. This change develops over time as buyers become more aware of what cars are available in the market at what price.

86% of car buyers had a budget in mind for their purchase, but 38% increased it during their budget purchase journey.

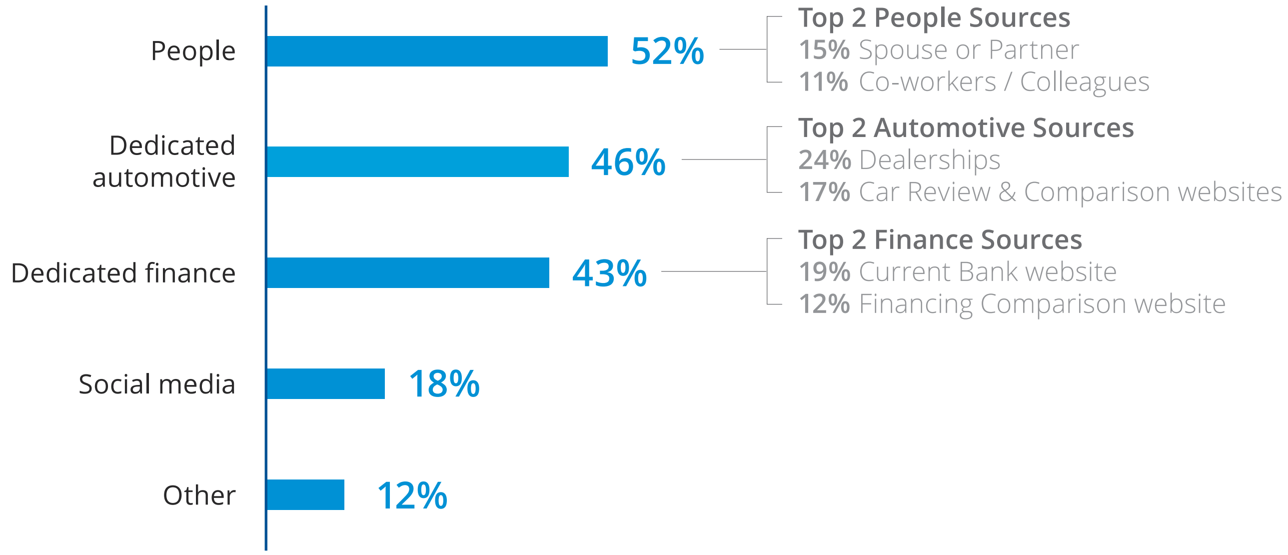
Owners - Budgeting



Had a budget in mind
→ **38%** Increased budget since beginning of purchase journey

Although just over half of buyers who used finance to fund their purchase indicated that they heard about financing options from other people, dedicated automotive and finance resources are the favoured way for consumers learn about finance offers. Consumers cited dealerships (24%), current bank website (19%) and car review & comparison websites (17%) as their top 3 sources of finance information.

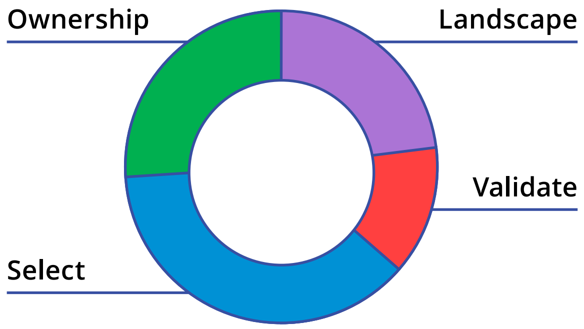
Where do you hear about financing offers?



INSURANCE

41% of car buyers either switched insurers or signed up to a new insurer when they bought their new car. Almost one quarter (23%) of consumers started thinking about car insurance in the Landscape stage, with 13% addressing it in the Validate stage, 38% in the Select stage, and 26% in the Ownership stage.

When do you think about insurance?



Most buyers choose to arrange their own insurance rather than going through a third party to avoid paying extra for the assistance. Research to compare insurance providers is minimal, and some buyers skip it altogether. The 3 key factors that assist buyers in selecting a provider are price, prior experience with a provider and trust in the brand.

Value for money is reflected as the most important element when choosing insurance. Buyers are looking for better annual premiums, better coverage and lower monthly payments.

Top important criteria when choosing insurance

26% Better annual premium

18% Better coverage

18% Lower monthly payments

11% No Claims discount

7% Flexible payment terms

6% Better customer service

THE DEALERSHIP EXPERIENCE

Visits to car dealerships have halved since 2013. On average, owners made just 1.8 visit to dealerships in 2017 and took just 2.2 test drives before collecting their new car.

Being able to see available vehicles on dealer or classified websites was crucial for buyers in deciding to visit a dealership. Buyers wanted to have access to photos of actual vehicles rather than generic stock images, and to get a sense of price before traveling to a dealership.

One of the effects of digitising much of the auto buying journey is that car buyers are willing to travel greater distances to find the exact car they want. Although the furthest distance travelled to a dealership by buyers in this study was 42kms, purchase intenders indicated that they would be happy to travel up to 70kms to visit a dealership that offered a better price, value for money or had the exact vehicle model desired in stock.

Main reason for traveling distance to see dealership?

25% They had the exact model I wanted in stock

23% Convenient with my routine

17% Lower price / better value for money

14% Dealer reputation

12% Bought from there before

Overall, buyers find the dealership experience to be a positive one, with 68% reporting that they had a good experience, and only 12% reporting a negative encounter.

Positive experiences were driven by location tidiness, treatment from staff, and having the exact model of interest available to see and test drive. Negative experiences predominantly stemmed from poor customer service or not having advertised vehicles in stock.

Positive Experience at a Dealership

55% Was clean and tidy

54% Were attentive and friendly

46% Had the model I wanted to see

46% Allowed to view / test drive the correct model

45% Were informative and gave relevant advice.

Negative Experience at a Dealership

30% Didn't treat me like I could make the final decision

29% Didn't have the vehicles they advertised in stock

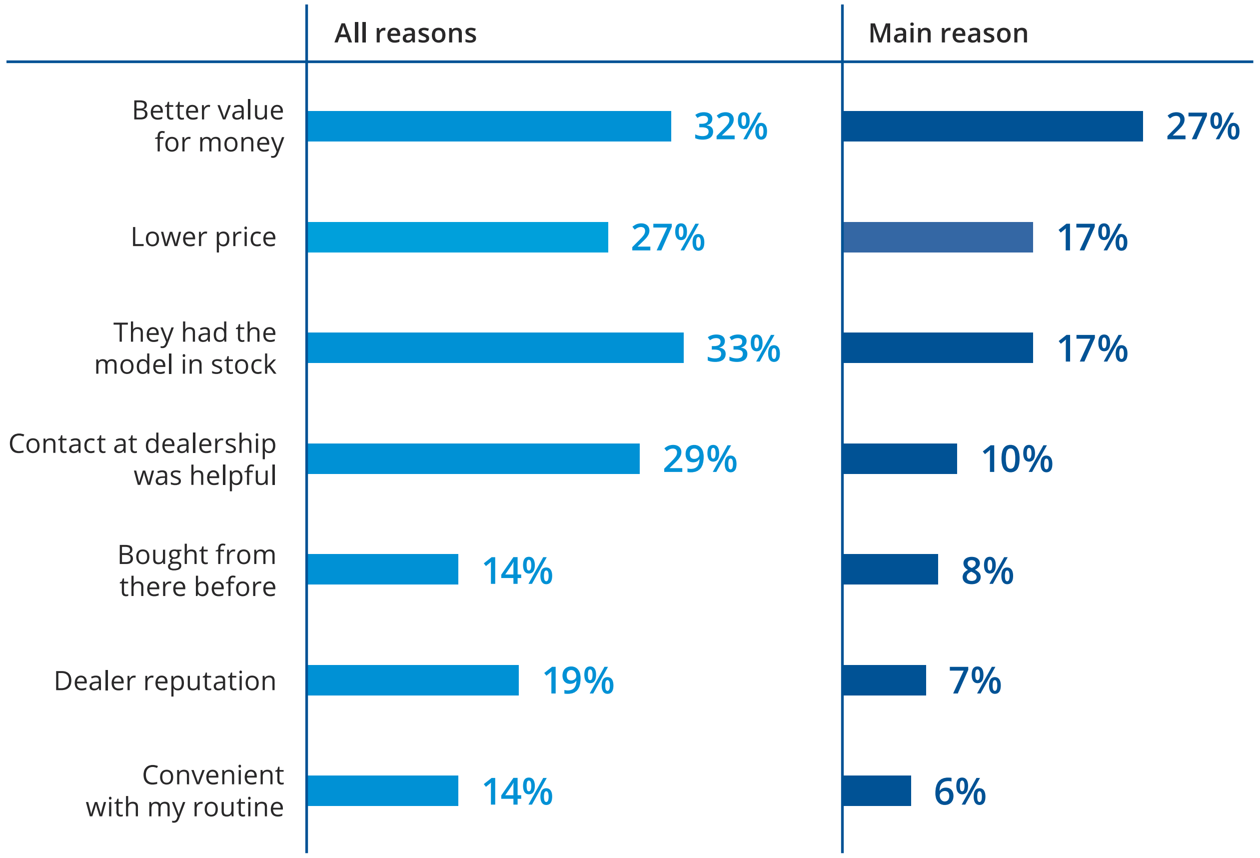
28% Applied pressure to sign that day

27% The waiting game was long / no one looked after us

27% Was not interested in what was suitable for me

The main reason buyers chose to purchase from a dealer was better value for money (27%), followed by lower price (17%) and having the model in stock (17%).

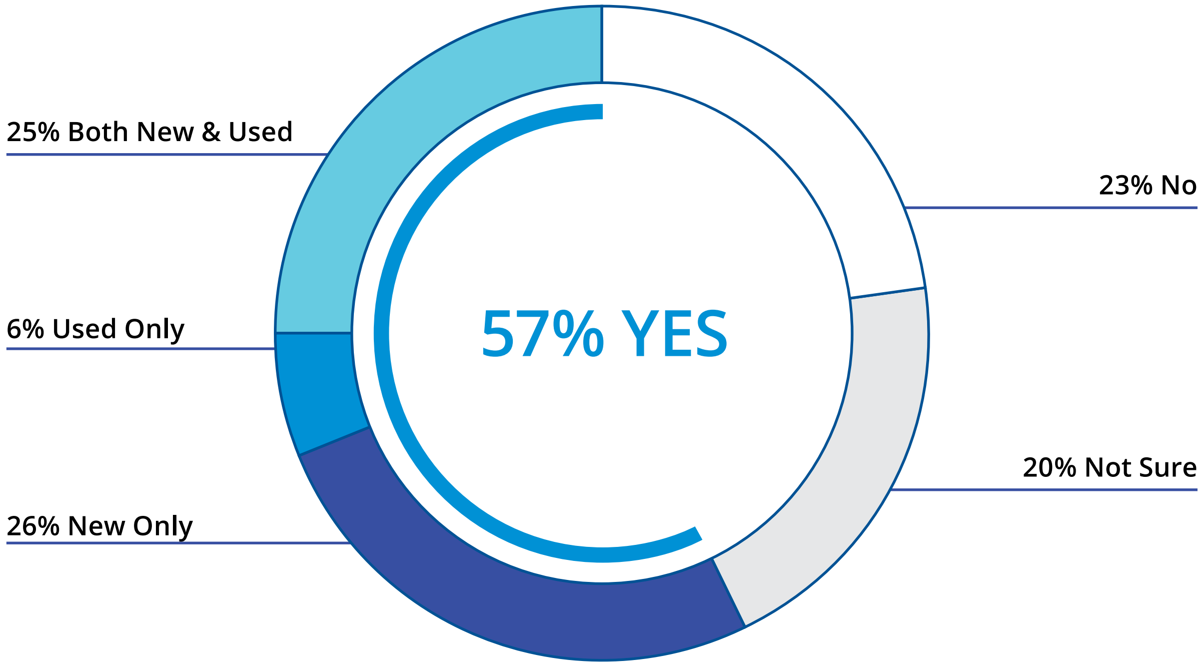
Reasons for choosing to purchase from dealer



ONLINE PURCHASE APPEAL

When consumers were asked if they could see a future where they would complete their entire vehicle purchase journey online 57% agreed that they could, with 20% of consumers unsure. It is worth noting that the 23% of consumers who could not envisage completing the car buying journey online skewed towards buyers aged 55+.

Is there a future where vehicles can be purchased entirely online?

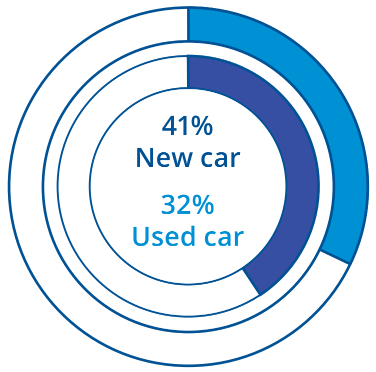


The main reasons given for being unsure or saying no was the inability to see, touch, and test drive the vehicle before purchase. Few consumers mentioned concerns related to the actual transaction itself.

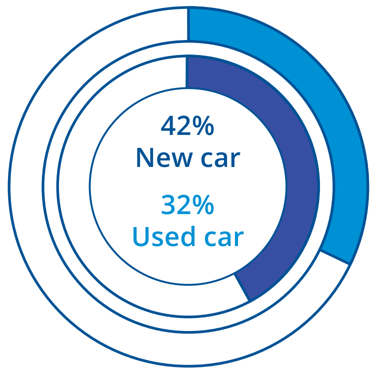
When consumers were asked about their current level of confidence in various aspects of the online auto purchase for a new vehicle, 41% said that felt confident that they could choose the vehicle they wanted to purchase online, 42% indicated they felt confident in putting down a deposit online, and 39% said they were confident in completing the transaction online.

When asked the same question about their current level of confidence in the online auto purchase journey for a used vehicle, significantly fewer people expressed the same level of confidence. 32% said they were confident choosing the vehicle online and put down a deposit, with just 30% ready to pay for the entire vehicle online.

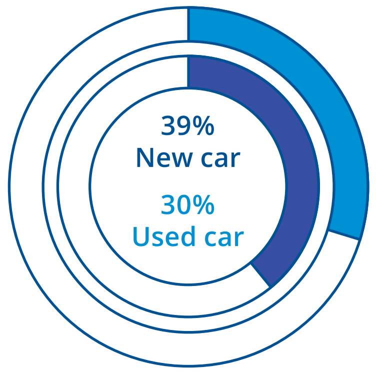
Current Confidence in Buying a Vehicle Online (2017)



Choosing the vehicle you want to purchase online



Putting down a deposit for the vehicle online



Paying for the entire vehicle online

In looking at both the future possibility of and current confidence in buying online, the main obstacle standing in the way of consumers completing their auto purchase journey online is the absence of a sensory experience. Most buyers are unwilling to fore go the opportunity to physically view and test drive vehicles entirely.

> "Because it's a large purchase most people would want to at least sit in a car before they buy it."
>
> — Female, 36 – 45yo, Intender

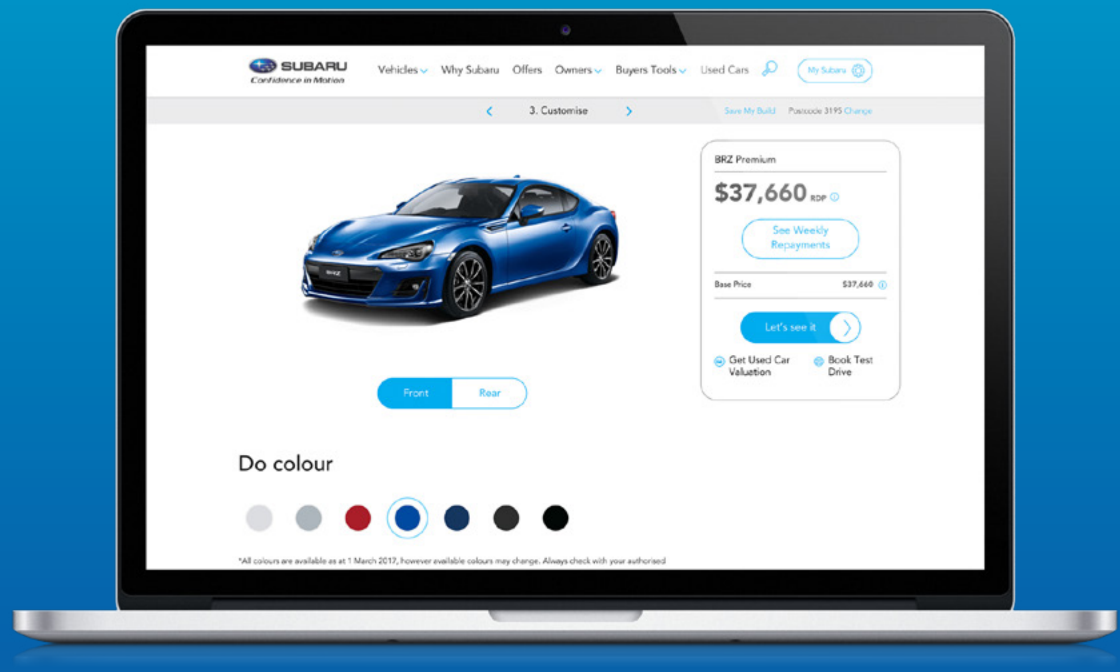
Buyers feel comfortable conducting these parts of the purchase journey online:

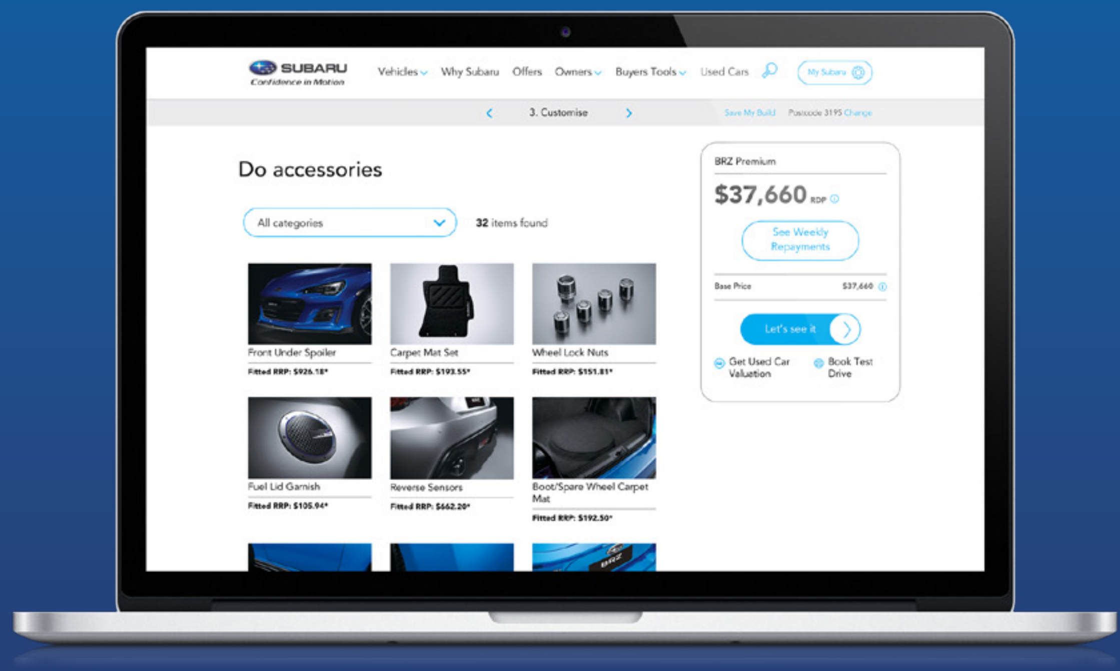
- → Research to identify models of interest
- → Read reviews and comparisons to shortlist favourites
- → Identify where models of interest are available, and at what price
- → Arrange finance and insurance for the vehicle
- → Finalise contracts with the dealership

> "People need to feel the vehicle. It's taking away the excitement of buying a new car."
>
> — Male, 18 – 35yo, Owner

Current barriers to full online purchase:

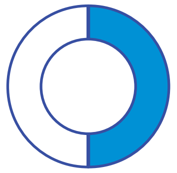
- → Risk associated with not seeing the vehicle in person
- → Needing to feel a car, and know it fits 'me' e.g. vehicle comfortable to drive
- → Fear of missing out on the ability to negotiate in person





ELECTRIC VEHICLE APPEAL

Electric vehicles (EVs) are met with cautious curiosity by consumers. Although half of consumers claim to be familiar with EVs, only 26% said they were likely to take up the technology. There is a sentiment that electric cars are 'not quite there yet' in terms of technology - and because they see fewer EVs than regular vehicles on the road they use this, in part, to support this point of view.



Familiarity
50% Are familiar

Likelihood of take up
26% Likely
42% Unlikely

"I guess they are the way of the future, but for real car lovers it's a different kind of drive"

The three areas of concern for consumers when it comes to EVs are the vehicle itself, charging of the vehicle, and the expense to purchase and run.

There is a level of uncertainty about how the electric motor impacts the speed and power of the car, and as such the way it feels to drive. There is also a perception that there are a limited variety of EV models available, and as such there might not be one available to suit specific lifestyle needs.

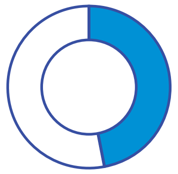
Consumers are unsure as to what distance is manageable between charges, and a limited awareness of charging station locations helps to fuel this uncertainty. The time taken to charge the battery was also an unknown - although consumers did voice that they felt that several hours was unacceptably long.

Consumers also feel that EVs are expensive to purchase, with Tesla commonly used as a yardstick for pricing. Additionally, there was some concern around the ongoing running costs of the vehicle, especially in light of Australia's current electricity prices.

"It could be interesting to see where this goes in the next 10-20 years"

AUTONOMOUS VEHICLE APPEAL

Consumers report similar levels of familiarity and intention to uptake autonomous vehicles as they do with EVs, with 47% of respondents claiming familiarity, and 24% likely to uptake. However autonomous vehicles raised far more concerns with buyers, particularly around safety.



Familiarity
47% Are familiar

Likelihood of take up
24% Likely
47% Unlikely

"I think they're scary. Just the thought of not being in control. I have way more trust in humans than I do in technology!"

Whilst some autonomous features have high appeal with consumers (e.g. cruise control, collision avoidance system and blind spot warning system), and are perceived to make driving easier and safer, full automation is associated with high risk, stemming mainly from the consumer's previous negative experiences with other technology.

Australians also love their cars and driving, and many feel that it is a skill that needs to be maintained. Buyers are hesitant to give up control, and in order to do so they want more rigorous testing and much more evidence around the safely of autonomous technology

"That is amazing. I would love to have a car that could drive me to work while I watch videos or do other stuff"

Which level of autonomy is most appealing?

Level 0	20%	The driver (human) controls all of the driving.
Level 1	33%	Most functions still controlled by the driver. The vehicle has some driver assistance features. Control is shared between driver and automated system, e.g. Adaptive Cruise Control, Park assist, Lane Assist.
Level 2	19%	Diver actively monitors driving, however driving (accelerating, braking and steering) handled by an automated system. Driver is ready to intervene if system does not respond properly.
Level 3	16%	The driver can safely turn their attention away from driving tasks. Automated system able to handle situations that call for immediate response. E.g. Emergency braking. It will alert the driver to respond within a certain time-frame if required.
Level 4	4%	No attention required from the driver for safety. Self-driving supported only in limited areas or under special circumstances.
Level 5	8%	No human intervention is required. Vehicle has the ability to self drive in every driving scenario.

APPENDIX

METHODOLOGY

OTHER SOURCES OF MEDIA CONSULTED

ECOSYSTEMS OF INFLUENCE

METHODOLOGY

carsales.com.au chose Ipsos as their partner for this research due to the heritage Ipsos have in automotive research globally. Ipsos have conducted similar Auto-Buyer studies using their proprietary 'Journey Pathfinder' approach to draw out the influences, behaviours and mindsets of consumers.

A mixed methodology was undertaken to map the consumer vehicle buying journey qualitatively, and then to validate the journey quantitatively.

The initial qualitative stage consisted of one-on-one gamified interview sessions, moderated by Ipsos, to engage consumers into telling the story of their purchase journey in great detail. With 12 in-depth interviews undertaken across Melbourne, Brisbane and Perth the research uncovered patterns in decision making, with a particular emphasis on the emotions, behaviour and triggers at key points in the purchase journey.

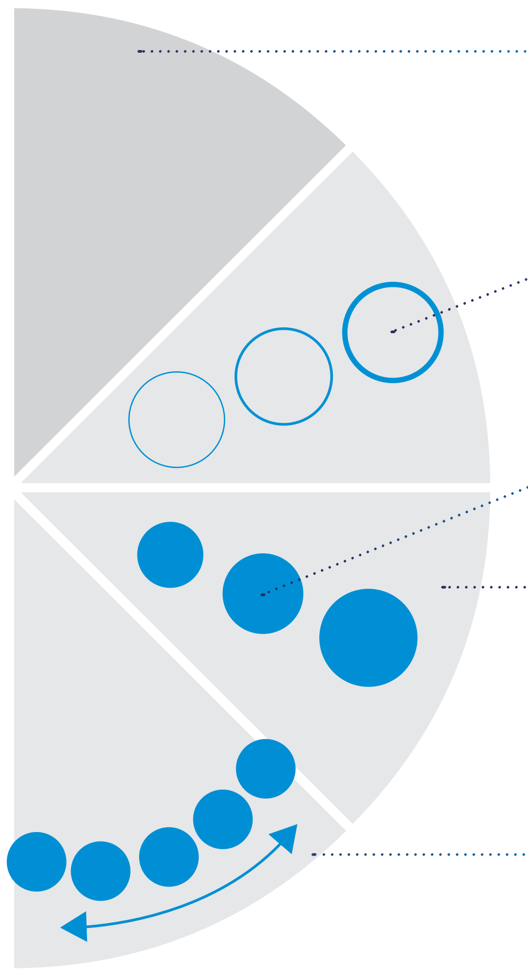
The findings from the qualitative stage were then integrated into a survey used in the quantitative stage to validate these patterns and purchase pathways. A total of 663 online surveys were completed across Australia, surveying consumers at varying stages of the purchase journey about their experiences thus far in the car buying journey. This offered insight into the needs, influences and milestones of each stage, as well as quantifying the channels, interactions and experiences throughout the purchasing journey.

OTHER SOURCES OF MEDIA CONSULTED
ON JOURNEY TO VEHICLE OWNERSHIP

	Social Networking Sites	Online Video Streaming	Web Forums	Television	Radio	Outdoor	
LANDSCAPE	18%	16%	13%	13%	5%	3%	LANDSCAPE
VALIDATE	13%	12%	13%	21%	4%	1%	VALIDATE
SELECT	9%	7%	11%	10%	4%	2%	SELECT
OWNERSHIP	8%	8%	7%	8%	2%	<1%	OWNERSHIP

ECOSYSTEMS OF INFLUENCE

INTRODUCTION



ROLE IMPORTANCE
Wedge highlighted in gray indicates role is more important in this stage.

EFFECTIVENESS
The **opacity of the bubble** shows the degree to which an influence has 'a lot' of influence at this stage.
More solid = more effective

FREQUENCY
The **size of the bubble** indicates the degree to which an influence is used in the stage. Larger = more used

SPECIFICITY
Location of the bubble in the wedge shows how closely aligned an influence is with the specific role within which it is placed.
Further from center = more specific

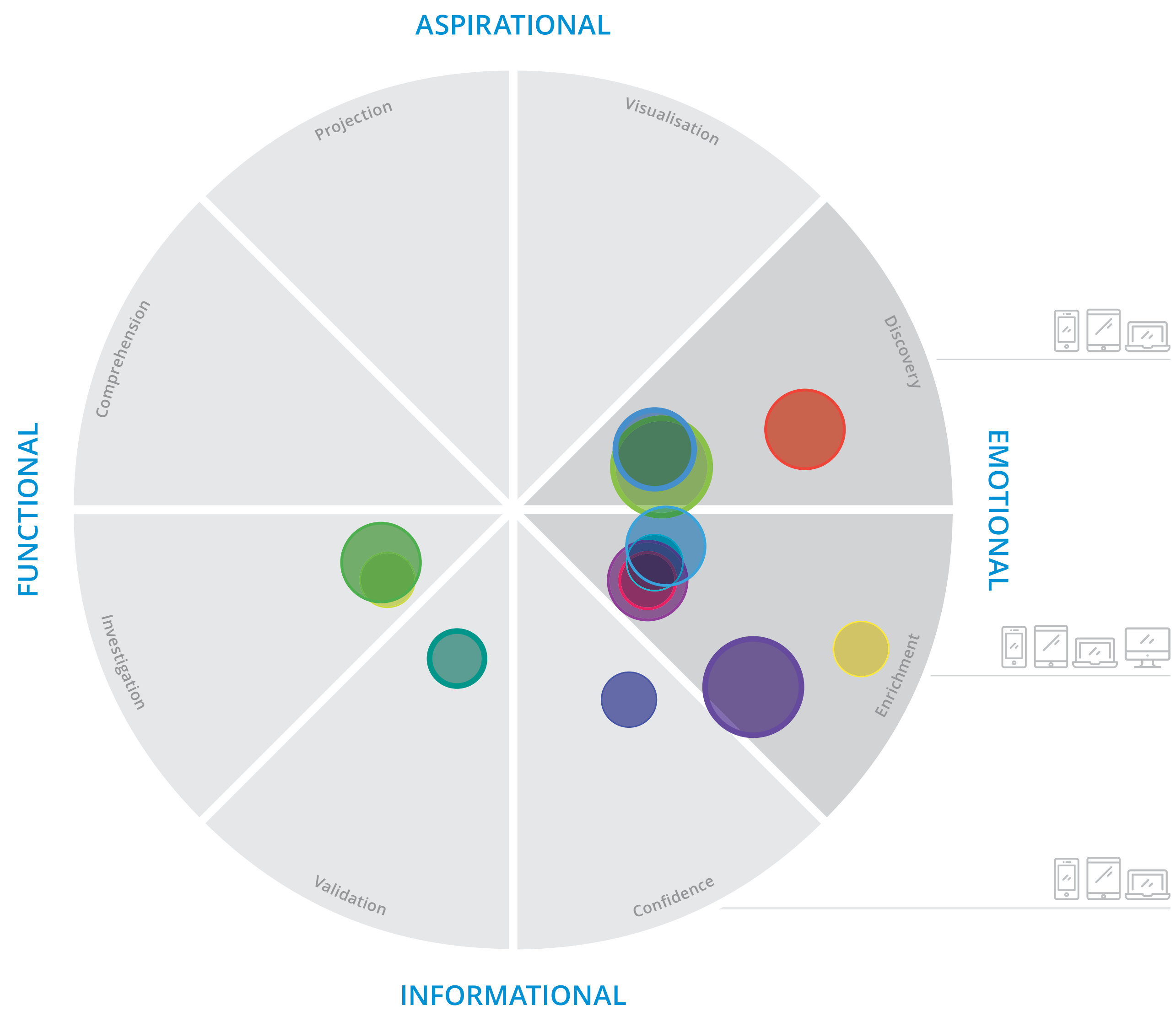
FUNCTION OF INFLUENCE
Angular placement shows the role the influence is primarily serving and how close to other roles it is.

MEDIUM OF COMMUNICATION

Mobile, Tablet, Laptop, Desktop & TV

STAGE 1: LANDSCAPE

INFLUENCER ECOSYSTEM



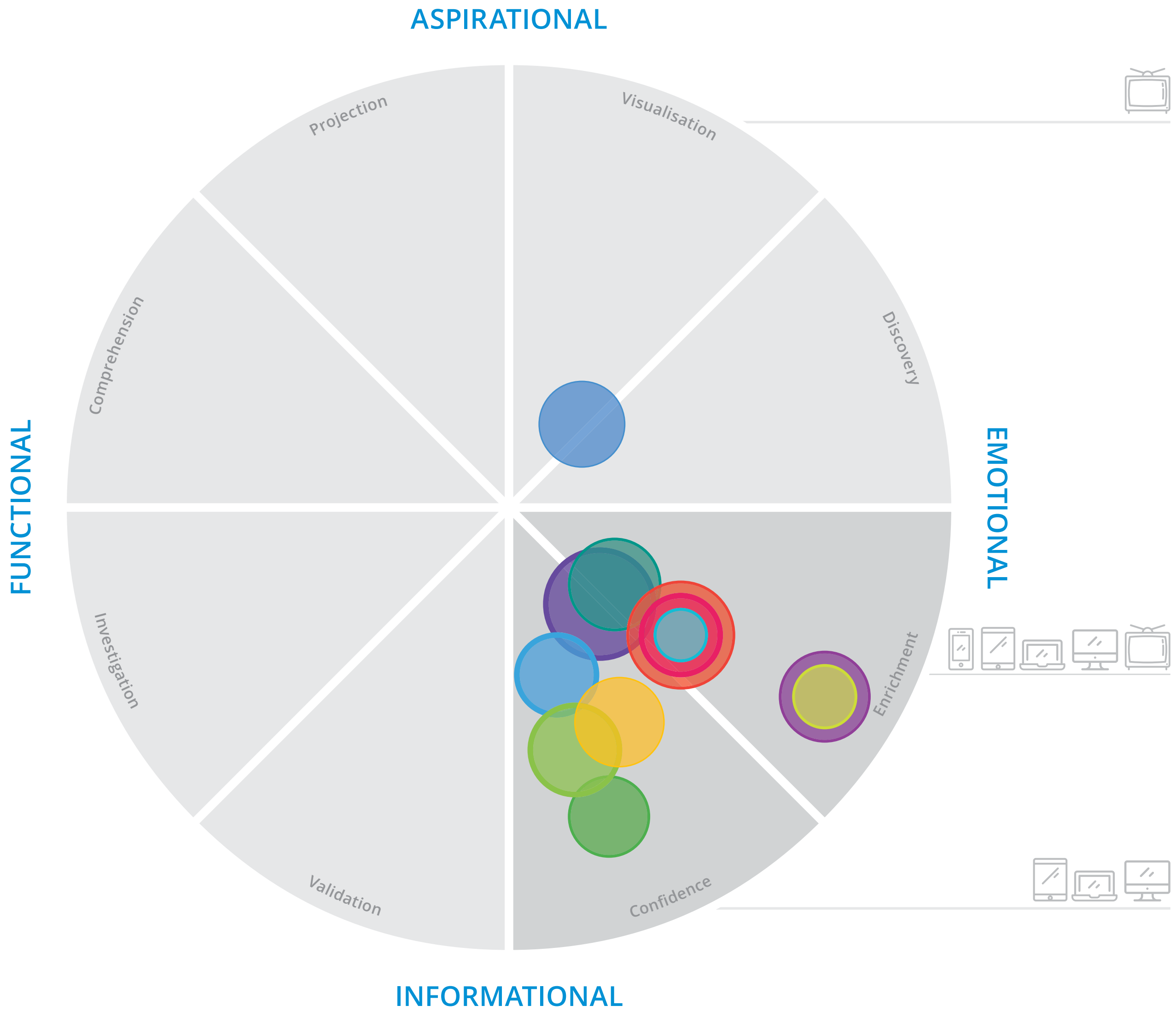
Media
- Dealer websites
- OEM Websites
- Search Engine
- Car review & Comparison websites/app
- Social Networking Sites

Activities
- Seeing vehicles out and about
- Socialising with Family
- Dealership experience - Staff
- Dealership experience - Vehicle
- Socialising with friends

People
- Spouse/Partner
- Dealer(s)
- Friends

STAGE 2:
VALIDATE

INFLUENCER ECOSYSTEM



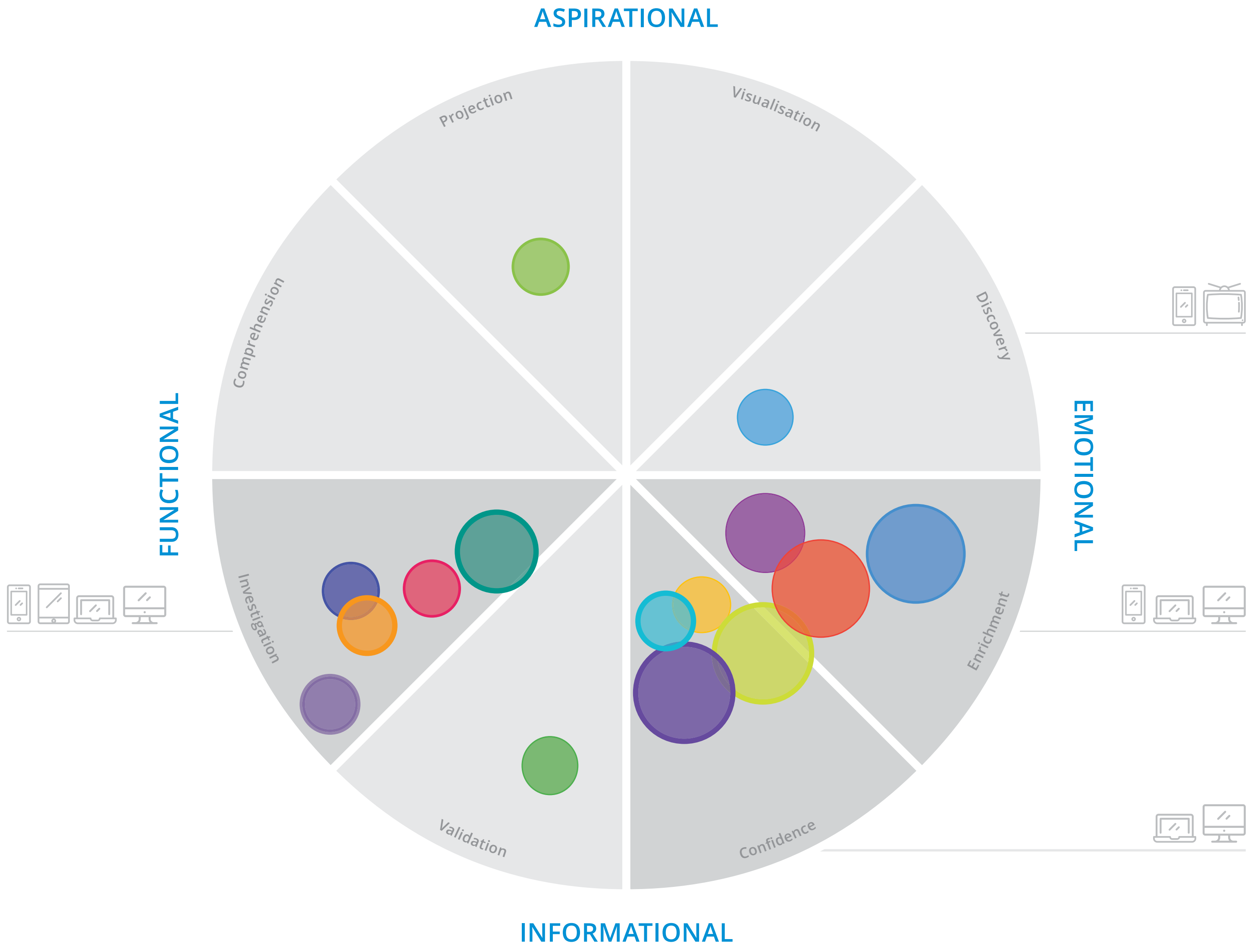
Media
- Dealer websites
- OEM Websites
- Search Engine
- Car review & Comparison websites/app

Activities
- Seeing vehicles out and about
- Socialising with Family
- Dealership experience - Staff
- Dealership experience - Vehicle
- Socialising with friends

People
- Spouse/Partner
- Dealer(s)
- Friends

STAGE 3:
SELECT

INFLUENCER ECOSYSTEM



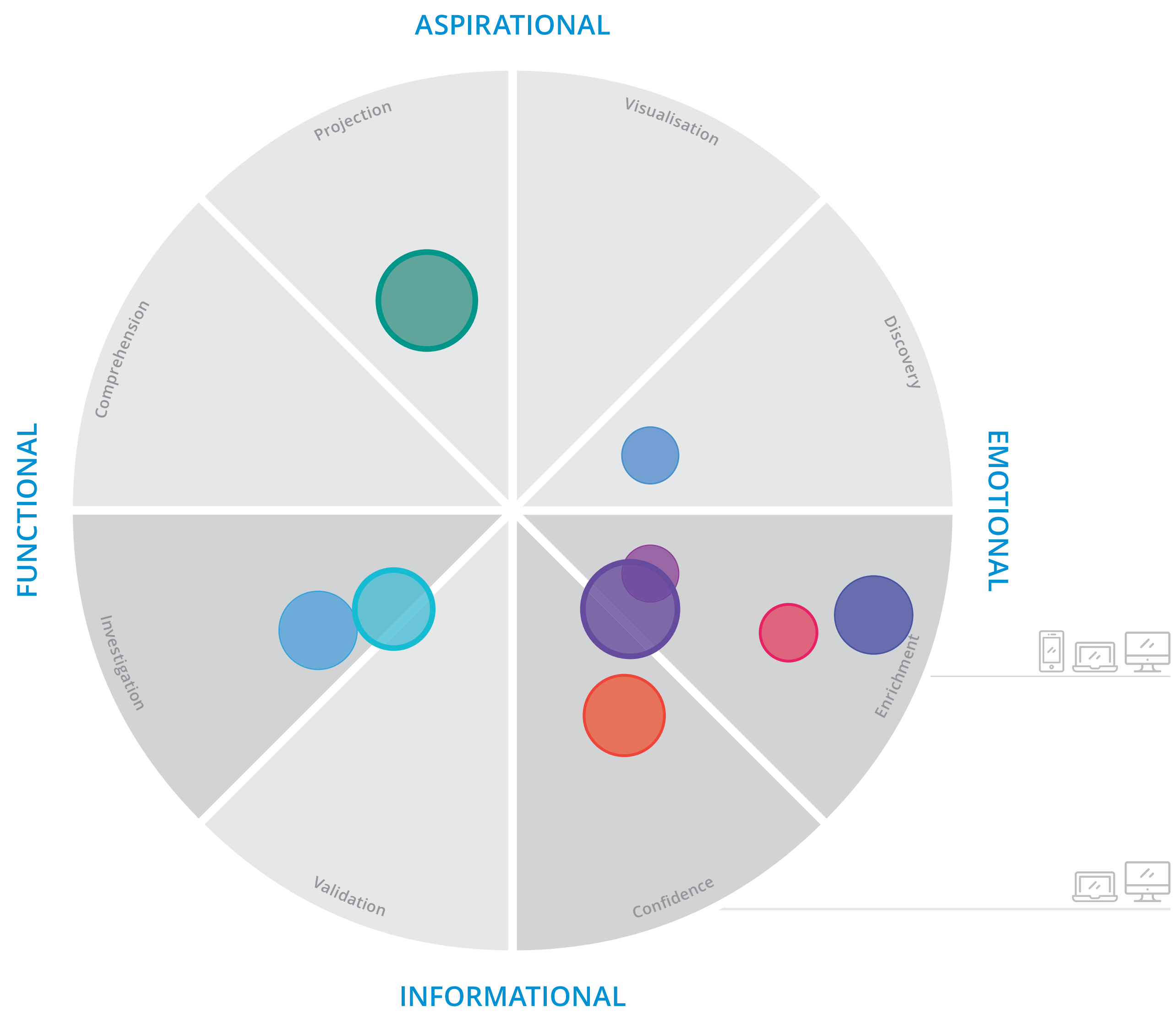
Media
- Dealer websites
- Valuation websites / app | Dealers | OEM Websites
- Search Engine
- Car review & Comparison websites/app
- Vehicle Brochure

Activities
- Seeing vehicles out and about
- Socialising with Family
- Dealership experience - Staff
- Dealership experience - Vehicle
- Socialising with friends
- Traveling

People
- Spouse/Partner
- Dealer(s)
- Friends
- Mechanic

STAGE 4:
OWNERSHIP

INFLUENCER ECOSYSTEM



Media
- Dealer websites
- OEM Websites
- Search Engine
- Car review & Comparison websites/app

Activities
- Seeing vehicles out and about
- Socialising with Family
- Dealership experience - Staff
- Dealership experience - Vehicle
- Socialising with friends

People
- Spouse/Partner

ABOUT CARSALES.COM.AU

The carsales Network is Australia's number one online destination for buying and selling cars, motorbikes, trucks, boats, caravans and machinery. Our market-leading Australian news and classifieds sites are augmented by classifieds businesses in Argentina, Brazil, Chile, Colombia, Mexico and South Korea. We aim to deliver superior results for all our customers and our vision is to make buying and selling vehicles easy and frictionless for consumers, dealers and manufacturers alike.

MediaMotive
MediaMotive enables brands to understand, engage and influence relevant, active and in-market consumers across Australia's #1 automotive website and app, carsales, as well as our suite of leading lifestyle and industry websites Our extensive online network offers advertisers the opportunity to reach 2.4 million people every month.

Our industry-leading data, analytics and insights ensure that the right message is delivered to the right audience at the right time, helping you to maximise your marketing return.

Dealer Development Team
The carsales.com.au Dealer Development Team works with Australia's automotive dealer network to provide solutions that help sell more cars, more efficiently. Our team of 60 industry experts work closely with our dealer partners to deliver more value, both on our network, and with their online advertising across the board.

Whether it's selling cars, bikes, boats, trucks or caravans, our people are passionate about helping dealers to improve their business. Through experience, tailored solutions, the most up to date technology and real- time data, we aim to point our dealers in the right direction to achieve a positive return on their advertising investment.