

Ipsos MORI

Car Buying & the Environment

Observations on Public Opinion

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King Review Seminar, 12th September 2007

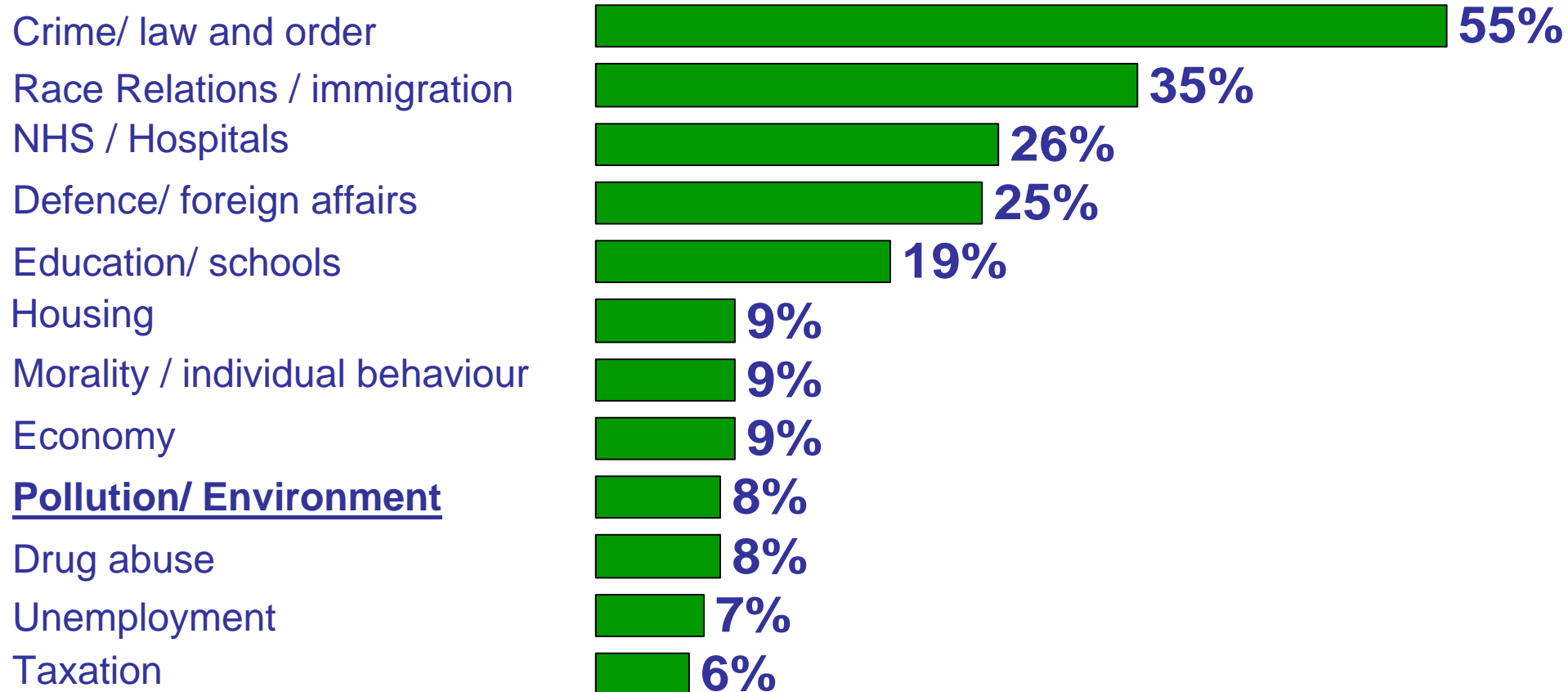


Context

Issues facing Britain: August 2007

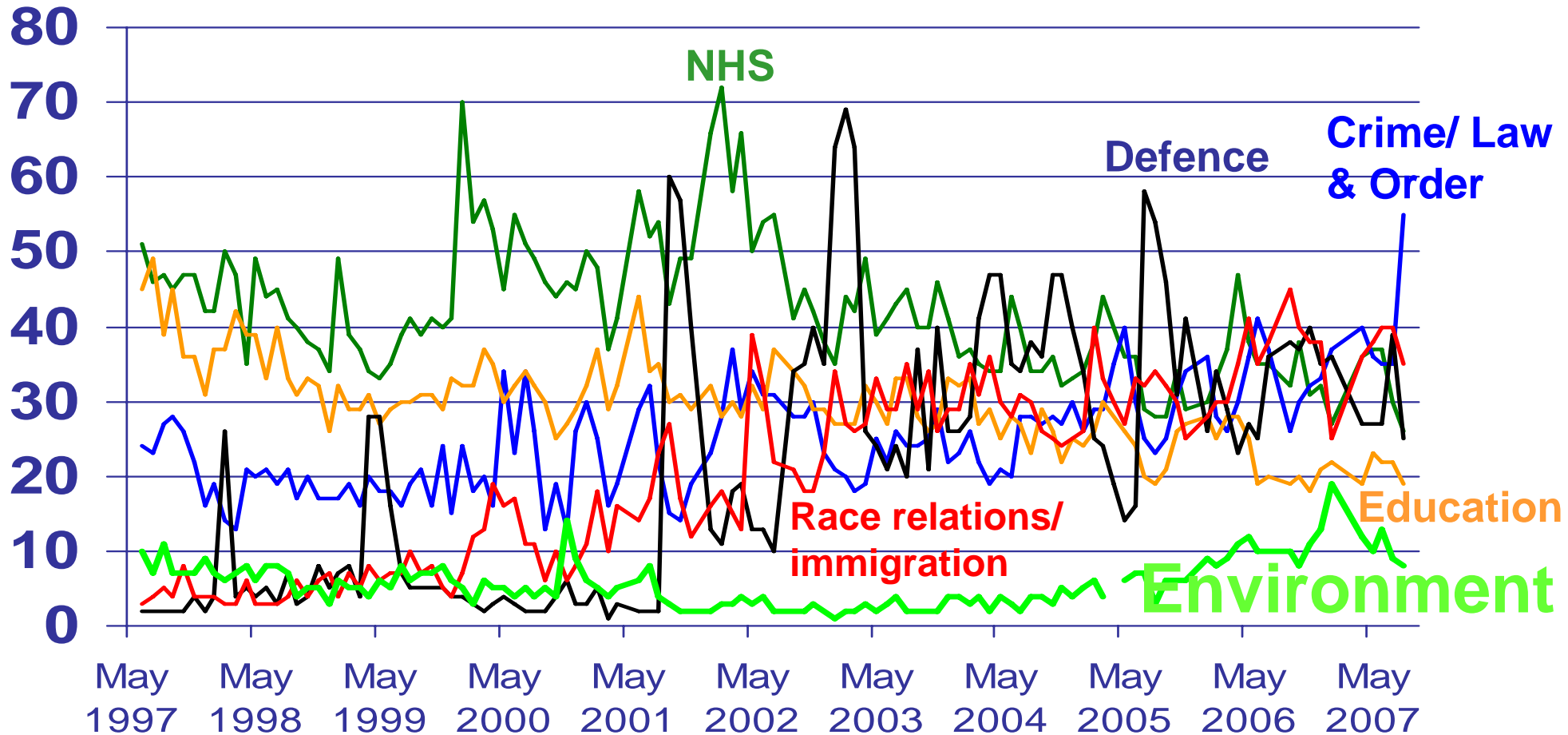
Q *What would you say is the most important issue facing Britain today?
What do you see as other important issues facing Britain today?*

Top spontaneous mentions



Issues Facing Britain: Long Term Trends

Q *What do you see as the main/other important issues facing Britain today?*



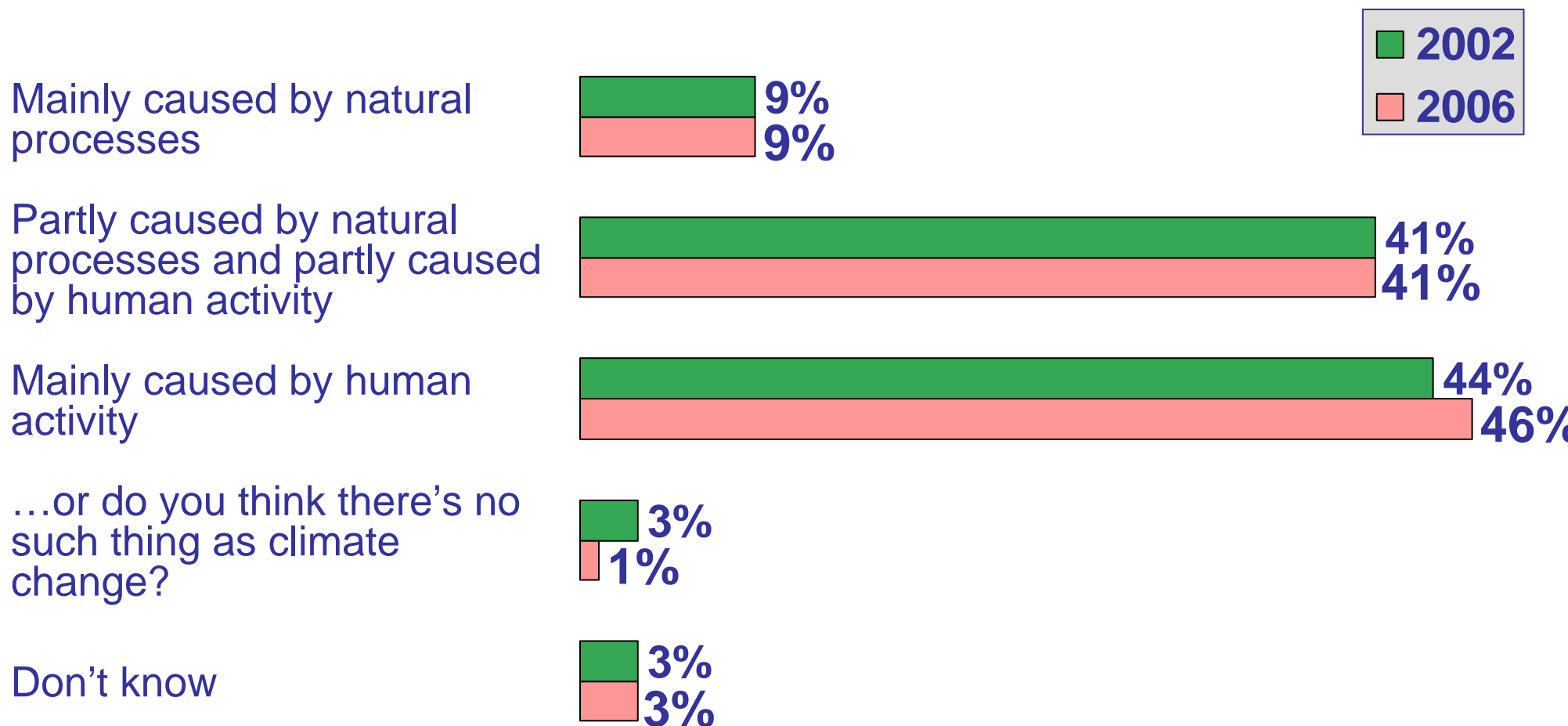
Who Cares?

"Global Warming / Climate Change"



What causes global warming?

Q Do you think that global warming is..



Which behaviours? Perceptions of impact on climate change (top 10)

Q Which of the actions on this list, if any, do you think will do the most to help reduce climate change?



Car Purchasing & Usage

Car Industry Trends

- 'Pariah' vehicles emerging (Range Rover, Porsche Cayenne)
- Many people believe that 'Four Wheel Drives' are penalised *because* they are four wheel drives – not because of emissions
- Also.....
 - New marketing emphasis on '2WD' Four Wheel Drive (eg Jeep)
 - Urgent 'greening' of engine technology (eg Diesel BMW X5)
 - Car makers of all types are 'going green' (eg Citroen, Ferrari)
 - Toyota Prius 'punches above its weight'
 - ..But hybrids not having it all their own way (eg Polo BlueMotion)
 - ..And emphasis remains on *sales* – so obvious 'social' conflict
- New car emission labels / ratings now established – but do not yet have same marketing 'clout' as eg NCAP safety ratings
- Motoring Press conscious of environment issues – but coverage remains predominantly product-based

The Car Buying Process and Environment 'Touch-Points'



Magazines / TV

Street

Friends

Internet / Configurator

Family Involvement

With Family / Partner..?

Advert

Mailings from dealer

Brochures

Browsing

Dealer Events

"Experience the real car"

Family / Friends

Post-Purchase



Negotiation

Familiarisation

Regular check to keep warranty

Endorsement by family / friends

Payment

Follow-up by dealer

Arranging service

Handover at dealer / home / manufacturer

Communications e.g. newsletter

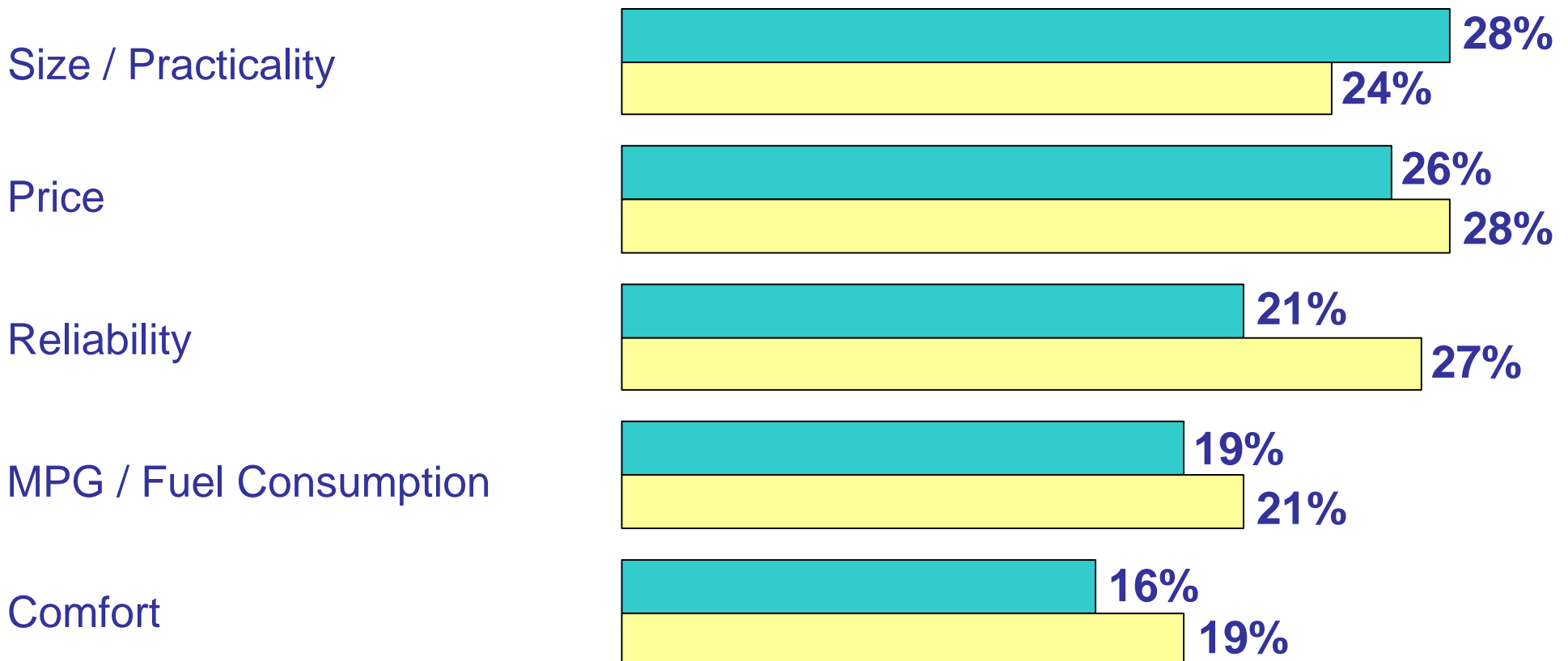
Conducting service

Invitations to events

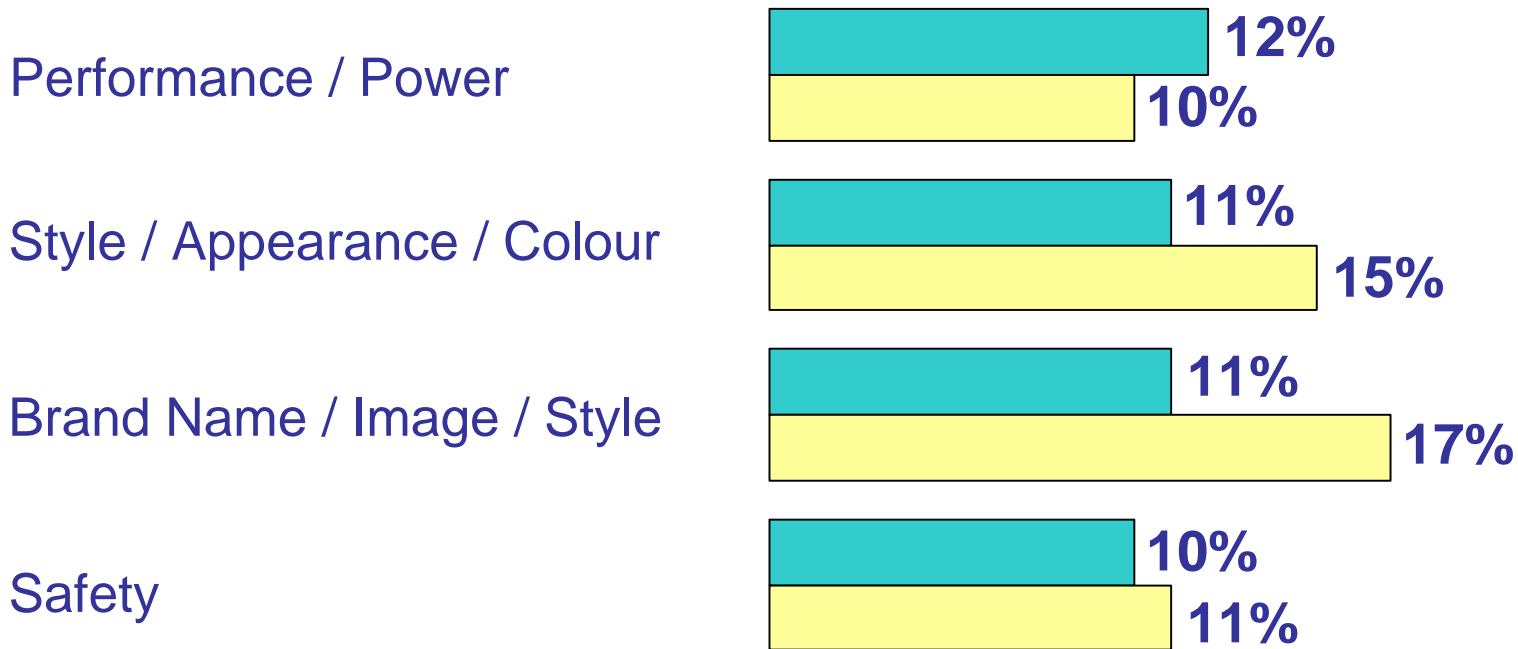
Car Purchase Criteria - 1

When you chose your current car, what factors were important in the decision-making process?

Which will be important for your next car ?

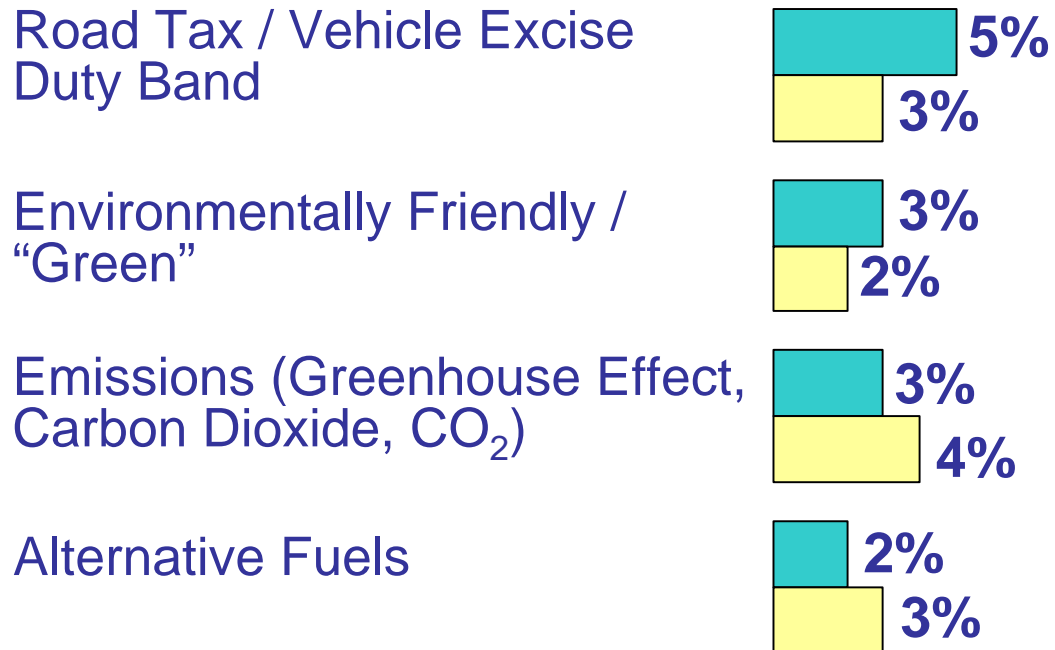


Car Purchase Criteria - 2



Base: All those with a car registered since 1 March 2001 (533);
All those planning to get a car registered since 1 March 2001 (624)

Car Purchase Criteria - 3



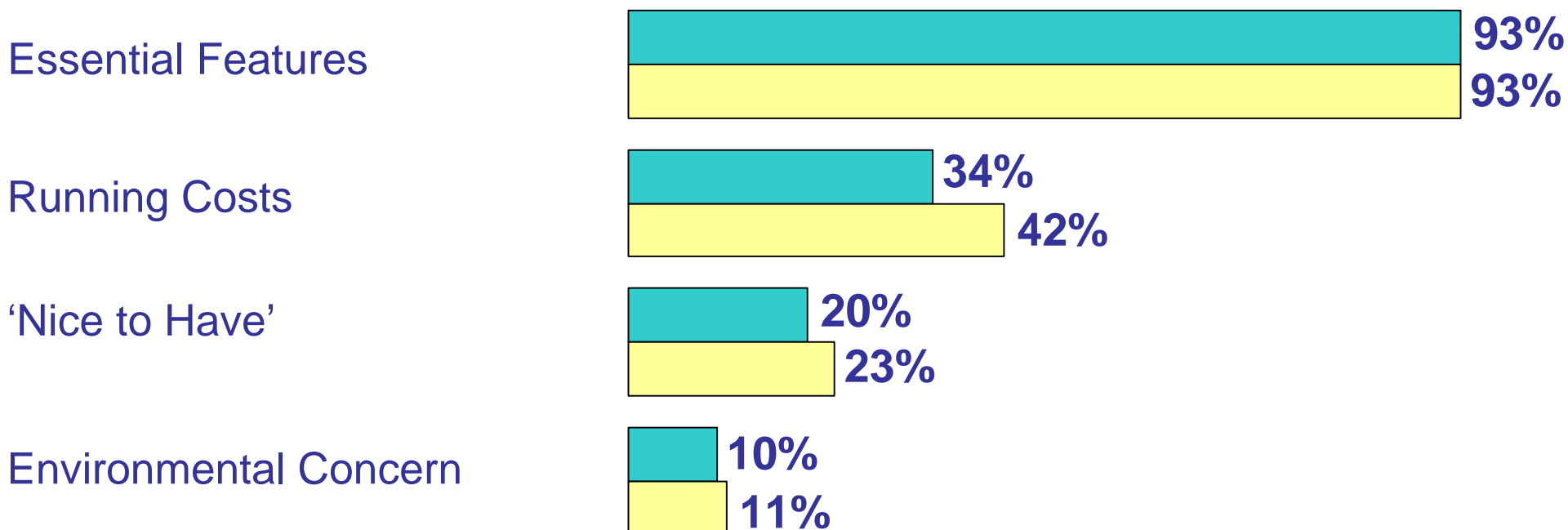
Base: All those with a car registered since 1 March 2001 (533);
All those planning to get a car registered since 1 March 2001 (624)

Car Purchase Criteria - Aggregates

When you choose your current car, what factors were important in the decision-making process?

Which will be important for your next car ?

■ Current car (Q11)
■ Next car (Q12)



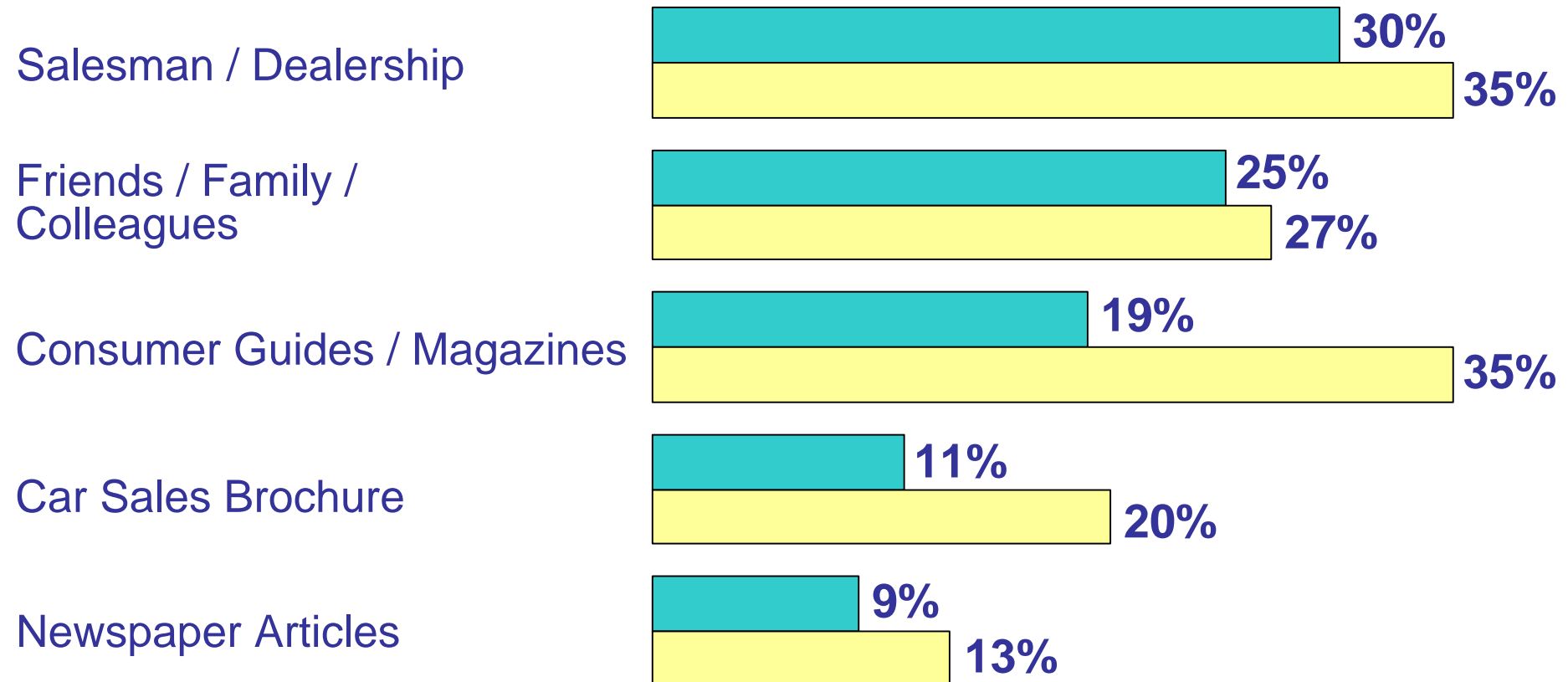
Base: All those with a car registered since 1 March 2001 (533);
All those planning to get a car registered since 1 March 2001 (624)

Information Used when Choosing a Car - 1

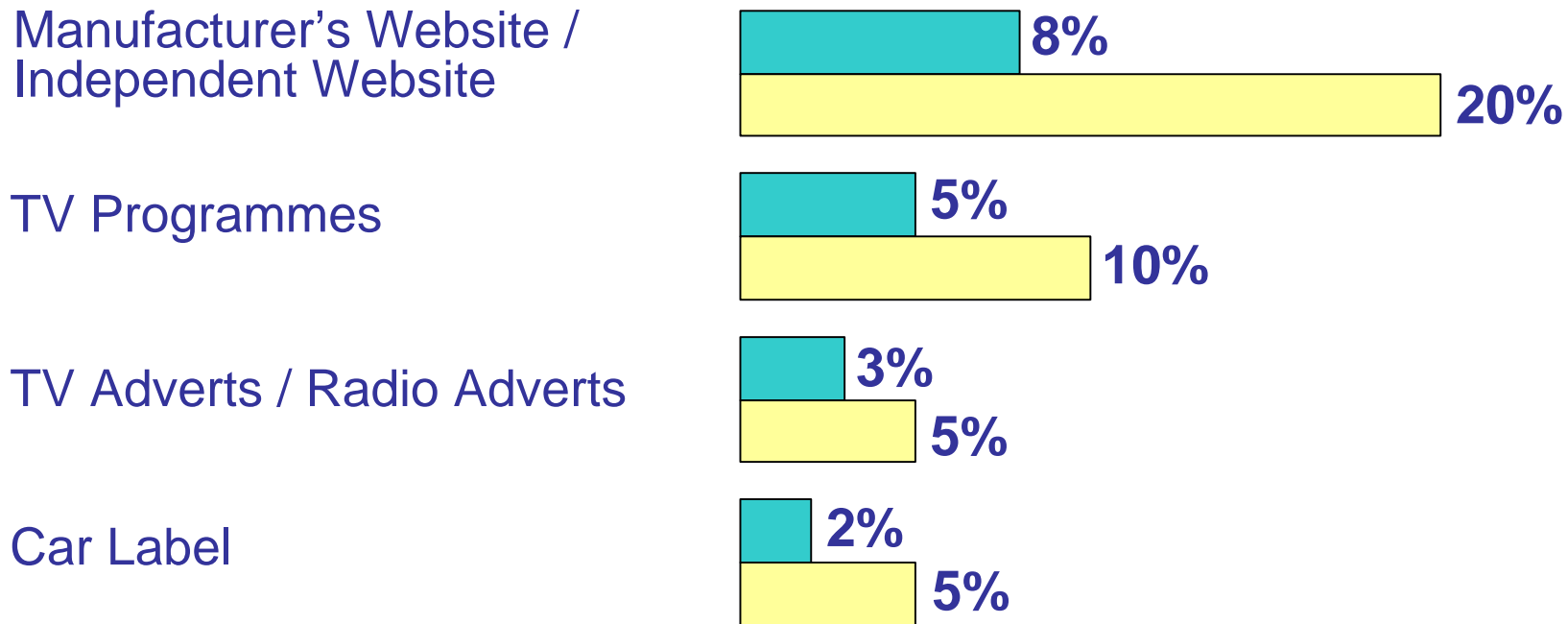
When choosing this car, which of the following sources of information, if any, did you consult?

And which, if any, do you think you might consult next time?

■ Current car (Q9)
■ Next car (Q10)



Information Used when Choosing a Car - 2

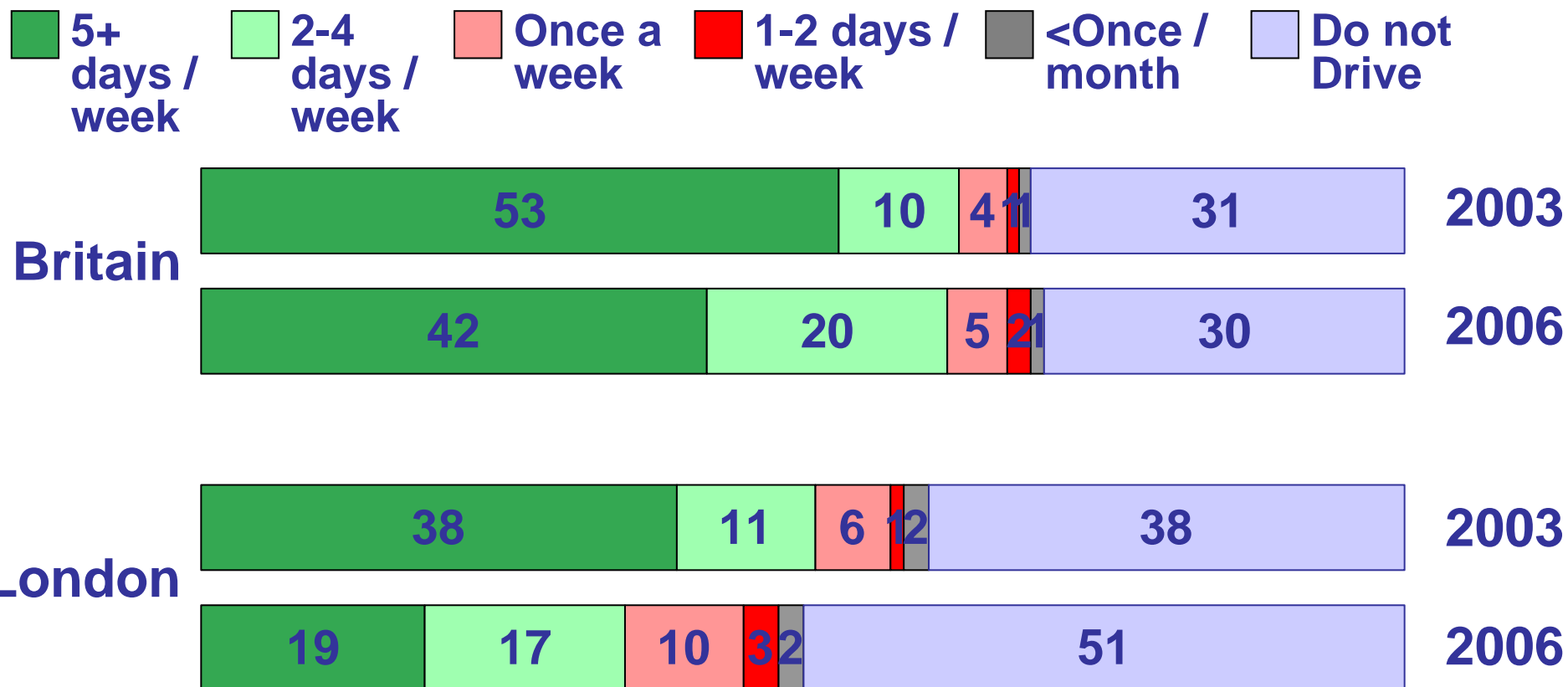


Base: All those with a car (3,347);

All those planning to get a car registered since 1 March 2001 (624)

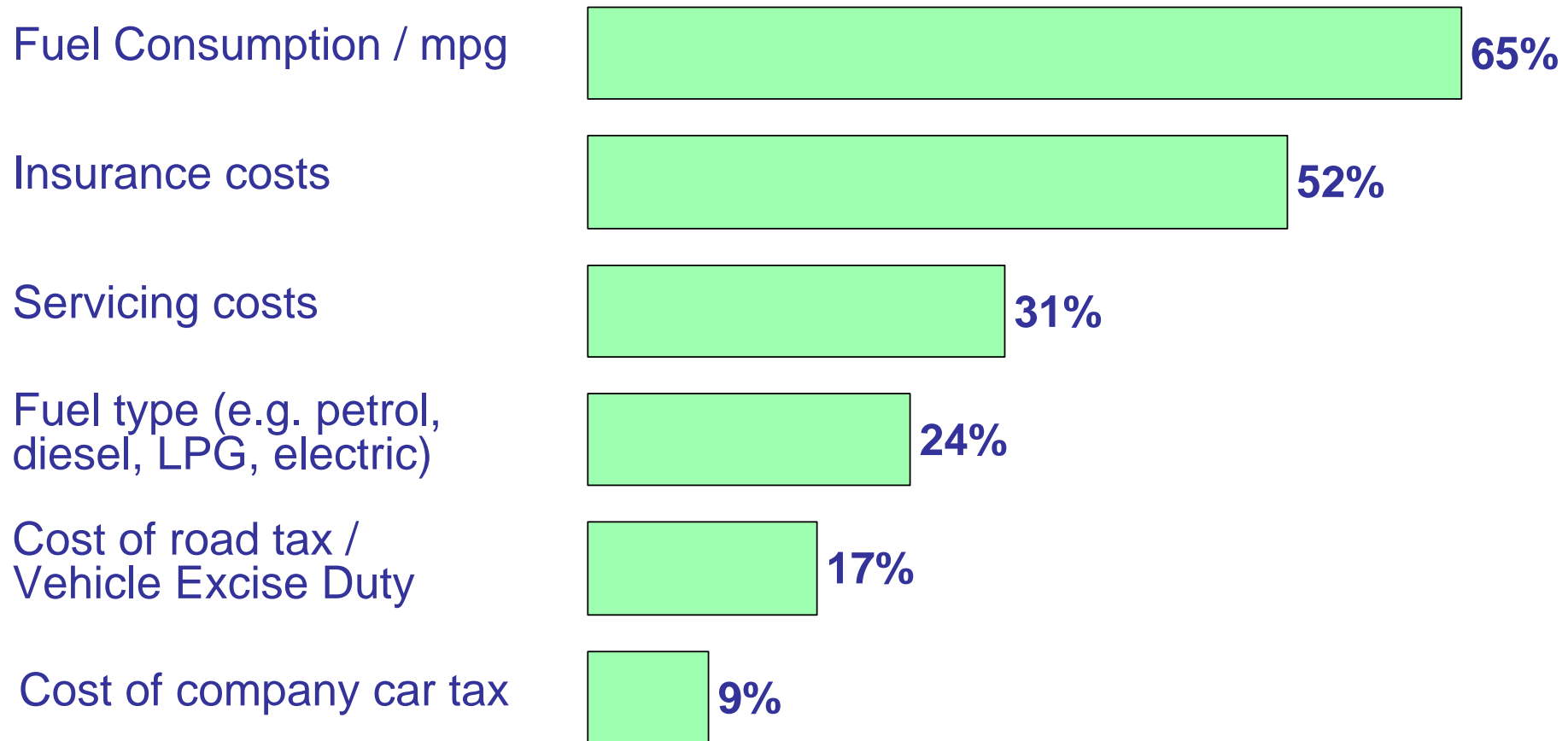
Car Usage Trends

Q How often, if at all, do you personally drive a car nowadays...?



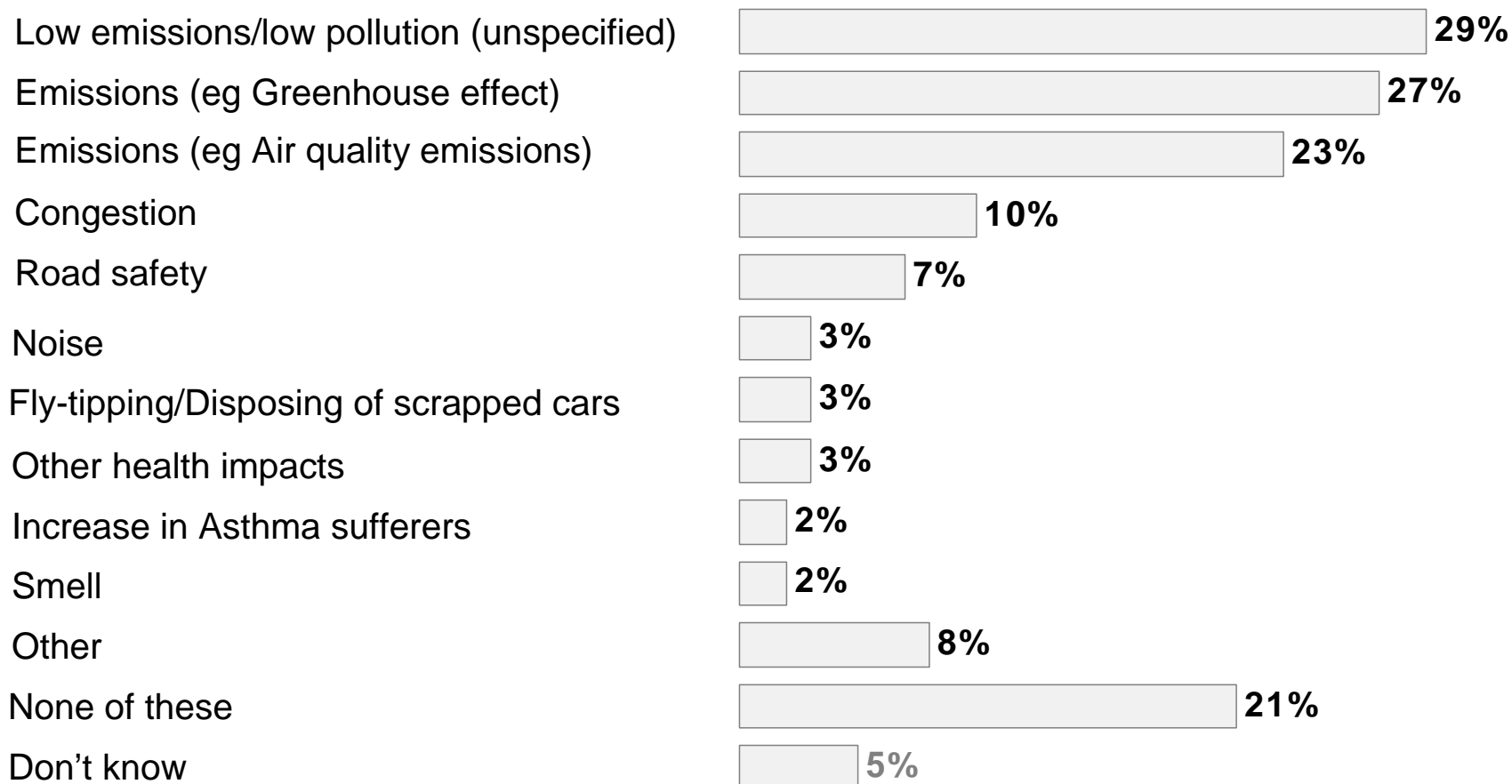
Running Costs

Q13 *When thinking about which make and model of car to buy / have, which, if any, of these running costs are most important to you personally?*



Environmental Consequences of Driving Cars

Q14 Which, if any, of the environmental consequences of driving a car concern you the most?



Base: All those who currently have or are planning to get a car registered since 1st March 2001 in the next twelve months (1,085)

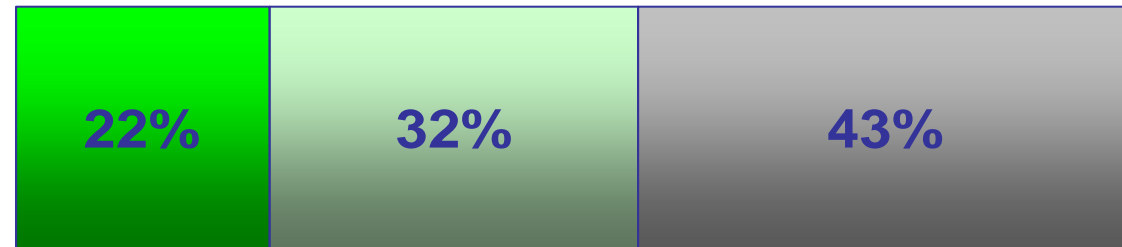
Source: MORI

Impact of Fuel price Increases..?

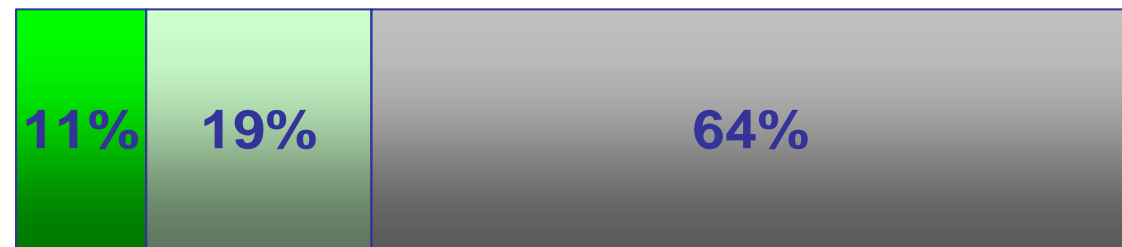
Q *What effect, if any, would each of the following have on your use of your car?*

 A lot less  Slightly less  No difference

Price of fuel doubling



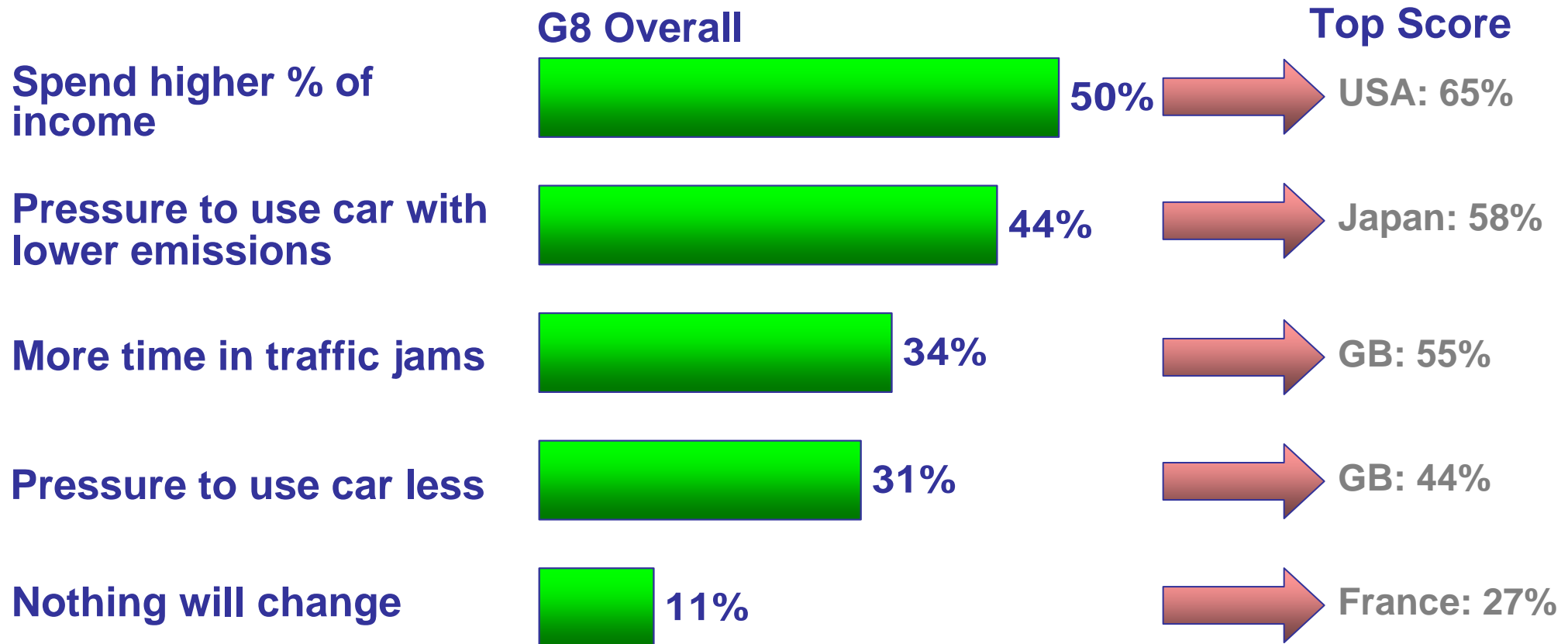
Cost of public transport halving



The Future - 5 Year Expectations MORI

(From 2003 to 2008)

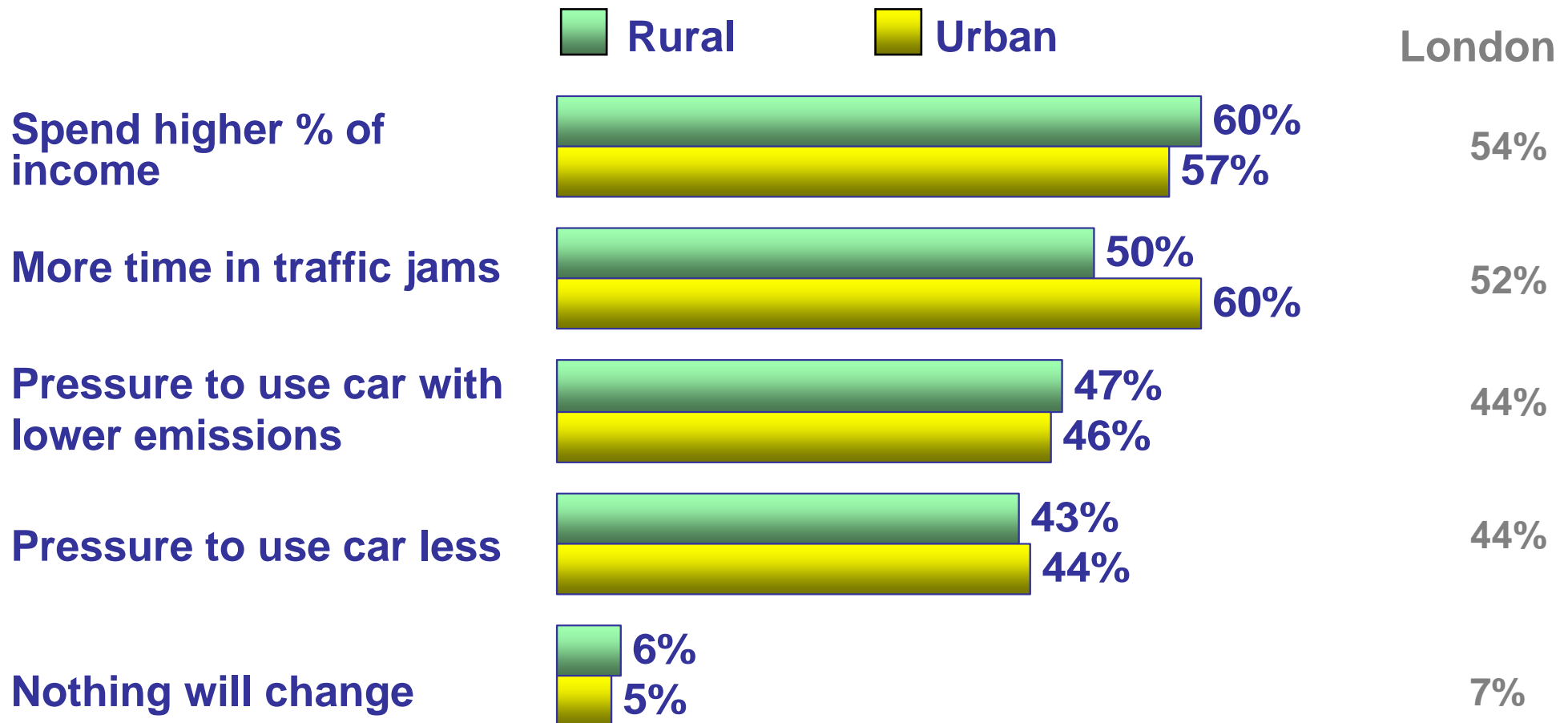
Q *As you continue using your car over the next 5 years which, if any, of the following do you expect to happen?*



The Future - 5 Year Expectations – GMORI

From 2003 to 2008

Q *As you continue using your car over the next 5 years which, if any, of the following do you expect to happen?*



Thank You

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