

Comparative colour-coded labels for passenger cars

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Introduction

Background

This report presents the findings of research assessing the use of environmental labels for new cars. The research was conducted by MORI (Market & Opinion Research International Ltd) on behalf of the Department for Transport. The key objectives for the research are as follows,

- **to provide information on the types of label format that are most effective in informing consumers of the environmental performance of cars**
- **to provide the Department for Transport with a timely evaluation to feed into the UK's report to the European Commission on the UK's experience of labelling (due by end of 2003).**

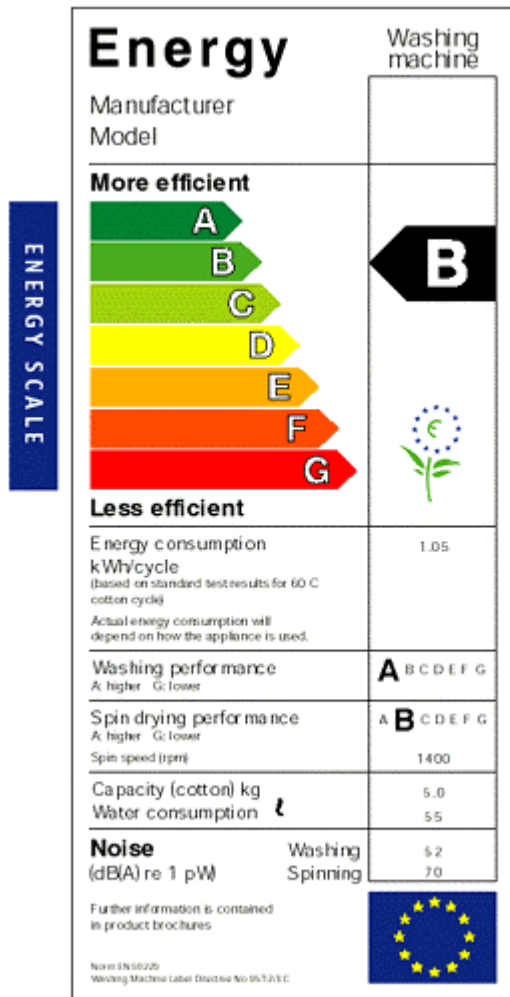
Within the overall research aims, a number of other objectives were considered. Namely,

- Explore the issues and gauge reactions to a range of specific label designs in a controlled environment - to include consumers of brand new cars from commercial premises and vehicle retailers.
- Provide measures of the frequency of the attitudes and behaviours reported in the focus groups.
- Test the results of the focus group work in real-life.
- Provide data that could be used to model the likely impact of the label on sales of new passenger cars.

This programme of research will help in evaluating the **development, introduction and usage** of an environmental label for passenger cars. Although the initial consultation and first stage of the research (focus groups) explored different prototypes of a label, the preliminary results showed the label based on the format of the Energy Label (see Figure 1) produced by the European Commission for domestic appliances (e.g. refrigerators, washing machines, freezers etc.) was the most accepted format by consumers.

Figure 1: Energy label for white goods

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Methodology

The research programme comprised three stages:

- Focus groups to assess reactions to the use of car labels, and proposals for the design of the labels (October - November 2002)
- Quantitative survey among new car buyers (February - March 2003)
- Pilot the label in car showrooms - researching sales people and consumers to gauge a broader range of views within the showroom environment (May - July 2003)

The first stage of research consisted of six focus groups during Autumn 2002. This provided a qualitative insight into buyers' thought-processes when buying a new car. It also assessed how important cars' "environmental impact" is as a factor in car buyers' purchase decisions.

A total of six groups were conducted in Leeds, London and Brighton (two in each) during October and November 2002. Each group lasted approximately one and half hours and consisted up to 10 participants per group. A copy of the topic guide and concept labels shown are appended.

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During the groups, three specific prototypes of the label were evaluated, with a view to developing one label which most effectively outlines a car's environmental performance in terms of CO₂ emissions and consequent cost implications. In order to understand the motivations and sentiments behind the feedback, the following areas were appraised during the focus groups:

- Factors When Buying a Car
- Information Used
- Comparing Cars and Information
- Final Purchase Decision
- Awareness & Understanding of Fuel Economy & Environmental Impact
- Awareness & Understanding of VED Bands/Taxation Implication
- Energy label -Awareness & Likely Usage
- Concept Car Label - Understanding, Reactions & Suggested Improvements

Participants were recruited on their current car ownership status, including a mix of different social-demographic profiles (gender, age, social class). MORI included new and nearly new car buyers (cars registered since 1 March 2001), and people intending to buy a new car - reflecting the vehicle types to which the new labels are expected to apply. A full breakdown of the groups' composition is detailed below.

Group	Type of Car Buyer	Social Make-up
Leeds (1)	New Purchasers (who have bought a brand new car since 1/3/01), including a mix of makes, models, and types of car.	Professionals and managers (ABC1s), mixed ages and gender.
Leeds (2)	Intenders (who are intending to buy a new or nearly new - registered since 1/3/01- car in next 0-12 months), including a mix of makes, models and types of car; and a mix of people considering to buy from a) commercial premises and/or b) vehicle retailers.	Manual workers (C2Ds), with a mix of ages and gender.
Brighton (3)	Nearly New Purchasers (who have bought a nearly new car - registered since 1/3/01), including a mix of makes, models and types of car; and a mix of people considering to buy from a) commercial premises and/or b) vehicle retailers.	Professionals and managers (ABC1s), mixed ages and gender.
Brighton (4)	New Purchasers (who have bought a brand new car since 1/3/01), including a mix of makes, models and types of car.	Manual workers (C2Ds), with a mix of ages and gender.
Surbiton (5)	Intenders (who are intending to buy a new or nearly new - registered since 1/3/01- car in next 0-12 months), including a mix of makes, models and types of car; and a mix of people considering to buy from a) commercial premises and/or b) vehicle retailers.	Professionals and managers (ABC1s), mixed ages and gender.

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Surbiton (6)	<p>Nearly New Purchasers (who have bought a nearly new - registered since 1/3/01, but not bought from brand new - car), including a mix of makes, models and types of car; and a mix of people considering to buy from a) commercial premises and/or b) vehicle retailers.</p>	Manual workers (C2Ds), with a mix of ages and gender.
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Whilst focus groups give an in-depth understanding of people's thoughts and feelings about a subject, the findings from this stage cannot be assumed to be representative of the views of the whole population. This first stage of research was not intended to provide a measurement of opinion, rather an in-depth understanding of different issues.

Based on feedback from the focus groups, the 'Energy Label' style was adopted as the prototype and further enhanced, based on participants' comments from the groups.

The second stage of research comprised a nationally representative survey among recent car buyers and those planning to buy new or nearly new cars, in order to quantify the findings from the focus groups. This gave a broader picture of the importance of environmental factors in car buying, and allowed a pilot label to be tested in relation to its ease of understanding, and likely usefulness to - and influence on - car buyers.

Questions were placed on three waves of MORI's face-to-face Omnibus, a regular MORI survey among the general public. A nationally representative quota sample of 5,763 adults (aged 17 and over) was interviewed in total. Each wave, respondents were interviewed face-to-face in their homes across Great Britain by MORI in c.201 different sampling points.

The interviews, completed by CAPI (Computer Assisted Personal Interviewing), were conducted between 6 - 10 February, 20 - 25 February, and 6 - 12 March 2003.

On completion of the omnibus research, the findings were used to develop the label further to consumers' needs.

The final stage of the research involved piloting the labels in new car showrooms across the country, to see how they work in practice for car buyers and sales staff alike. The objectives of the in-showroom research were to:

- test how the labels are used in real-life situations - how they are used, if at all, by car sales staff in the process of selling cars, and
- understand a broader range of views, including sales staff and consumers in a showroom environment.

The research comprised two elements:

- accompaniments and interviews with sales staff in five showrooms in England and Scotland, to record the reactions of sales staff using the new labels, and observations of how they use the labels in practice
- 'Guerrilla' interviews with those visiting these showrooms, to see how consumers used and reacted to the labels, and considered environmental information generally.

The findings of the accompaniments - of up to six hours each (including the post-accompaniment feedback) - were recorded on observation checklists which noted key aspects of how the label(s) work/do not work. This accompaniment was followed by a 15-minute interview. (Please see the *Appendices* for the Observation Checklist and Questionnaire that were used.)

A so-called 'Guerrilla' approach was used to observe - in as unobtrusive a way as possible - how the pilot labels were used by sales staff and those visiting the showrooms. The observations were

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followed by interviews with those customers observed (with their consent) about their showroom experience and impressions of the label. This approach involved:

- the use of checklists by MORI interviewers to record (unobserved) how much attention, if any, customers gave to the labels and the kinds of questions or discussions that passed between them and the sales staff,
- interviews of 15 minutes duration with customers in the 5 dealerships taking part in this piloting of the labels. In order to carry these out, interviewers first introduced and identified themselves to the customers (as they were leaving the showroom), and asked permission to conduct an interview.

The interviews with customers ran through the process of visiting the showroom, from initial thoughts as to what was expected, and what was of most importance in visiting the showroom in the first place; then more specifically, the particular factors - good and bad - that characterised the "showroom experience". This interview allowed customers to express their reactions to the label in some detail - initial awareness, understanding or expectation of what it was (before reading it), and then, if they did read it, reactions to its relevance, importance, clarity and the extent to which it may have affected people's thought processes.

We conducted 29 guerrilla interviews with potential car-buyers over a two-month period, with fieldwork taking place over a number of different days of the week, and times of day.

A control showroom - where car sales staff and customers could be surveyed *without* the environmental labels being piloted - was not used, as manufacturers display different labels in their showrooms. Some manufacturers include explanatory information only, others include additional information. So, it would not be possible to conduct an effective control, without controlling each of the showrooms pre-introduction of the pilot labels.

MORI would like to thank the Ford, Honda, Vauxhall and Saab showrooms who helped with the research.

Detailed Breakdown of Showroom Research

The table below shows how the fieldwork was split between the five showrooms participating in the research.

	Observation checklists completed for sales staff	Interviews with sales staff	Observation Checklists completed for customers	'Guerrilla' Interviews with customers
Ford (Maidstone)	7	4	6	5
Ford (Wimbledon)	3	3	1	0
Honda (Watford)	5	5	12	11
Honda (Glasgow)	8	4	8	8
Vauxhall & Saab (Yorkshire)	3	4	6	5
Total	26	20	33	29

Reporting

In the graphs and tables, the figures quoted are percentages. Reference should be made to the tabulations in the appendices for full answer lists to each question. The size of the sample base from which the percentage is derived is indicated. Note that the base may vary - the percentage is not always based on the total sample. Caution is advised when comparing responses between small sample sizes.

As a rough guide, please note that the percentage figures for the various sub-samples or groups generally need to differ by a certain number of percentage points for the difference to be statistically significant. This number will depend on the size of the sub-group sample and the percentage finding itself - as noted in the Appendix.

Where an asterisk (*) appears, it indicates a percentage of less than one, but greater than zero. Where percentages do not add up to 100% this can be due to a variety of factors - such as the exclusion of 'Don't know' or 'Other' responses, multiple responses or computer rounding.

Summary of Findings

1. The Importance of Environmental Concerns for Car Buyers

- Environmental performance is not paramount in car buyers' minds when choosing a car - and this is a barrier to the potential impact of introducing the labels in showrooms. Environmental considerations are a low priority when purchasing cars. If considered, it tends to be driven by a financial benefit to the individual rather than desire to help improve the environment.
- The quantitative research highlighted the *combination* of different specifications and features that makes one car preferable to another. No one aspect is exclusively important. However, certain factors including **practicality**, **reliability**, **cost**, the **sales package** and **safety** are the most common aspects affecting most car buyers' decision to purchase.
- Fuel consumption efficiency is much more important to car buyers than any consideration about emissions, principally due to the financial impact that commuting and recreational driving has on households.
- Environmental factors could become more persuasive in the decision-making process of buying cars - if this incurs no additional cost, particularly if there are cost **savings**. But, at present most consumers are not aware of any obvious link between VED and CO₂ emissions (many think VED is based on engine size), and there is more interest in fuel consumption - through purely self-interest - than CO₂ emissions.
- Safety is an increasingly "sexy" issue, whereas, by contrast, the environment is still seen as a dull, albeit important, issue. The investment often required (for the initial outlay of a more environmentally-friendly car) is not considered to be worth making because of the "I cannot make a difference on my own" attitude.
- There is a limited understanding of how cars need to be improved to make them more environmentally-friendly, and few people think that unleaded petrol, diesel or catalytic converters make a car environmentally-friendly. Instead, they are more likely connect this to alternative fuels, low emissions and low fuel consumption.
- There is poor understanding of the link between carbon emissions and fuel consumption, and Vehicle Excise Duty (VED) does not have a significant impact on car buying. Understanding that VED is based on carbon emissions is patchy, and - given limited environmental concern - for most people, the differences between bands are not large enough to be taken into account when other costs are considered.

2. Car Buyers' Interest in Environmental Information

- Whilst limited interest was shown at the focus groups in information about cars' carbon emissions, the quantitative survey suggested that 'environmental performance' - which should be distinguished from fuel efficiency in the context of motoring costs - could have the potential to become another marker of distinction, in the same way that car safety is now used to distinguish between cars. The quantitative survey found that, *in principle*, car buyers are receptive to comparative information to help them choose which make and model to buy/have, and this extends to environmental information and information about fuel efficiency.

- The quantitative survey suggested that there is a role for environmental labels to provide comparative environmental information and, in particular, information about fuel efficiency, an aspect of environmental performance that is of concern to many car buyers. Despite the wide variety of information currently available to car buyers - whether through car showrooms, magazines, TV, the internet or through friends and colleagues - this can be hard to compare, is not always independent, and does not focus on *environmental performance*. Hence, an environmental label could have a niche for car buyers interested in comparing information about emissions and fuel efficiency.
- However, the showroom research found that, *in practice*, environmental information is *not* of widespread interest to car buyers, and that car labels - whether provided by the Government, SMMT or manufacturers - are *not* important for car buyers or sales staff as sources of information *in practice*.

3. Using Environmental Labels in Showrooms

- Whilst the quantitative survey found a fairly positive response to the A-G Label, with most people saying - in abstract - that it would be useful to them when choosing a car, the in-showroom research found that car buyers show limited interest in environmental labels and few use the labels in practice.
- Whilst there is broad interest in comparative information provided by showrooms across a range of areas, including finance / sales packages, ongoing running costs, equipment levels, safety and performance, there is much less interest in information about emissions and VED/tax band. This reflects the lack of interest in car emissions and VED/tax band. With car buyers' interest in environmental performance relatively undeveloped, compared with their appetite for information about finance and sales packages, equipment levels and comfort/practicality, the pilot labels are not widely seen as useful. Most of those who looked at the labels found them 'fairly useful'. This reflects individuals' interest in environmental information - those who are interested in this information and pay attention to the labels generally find them useful, whilst those who are not interested in environmental information will not pay attention to the labels.
- To overcome the low awareness of, and interest in, environmental labels on cars among car buyers, there is a need for simplification and a better focus: "something very quick, very basic" (Female, Surbiton 1). The labels need to be something that a customer in a showroom can glance at, and take away the key message about whether the car is high polluter or a low polluter.
- A greater focus on fuel costs and/or more promotion about the environmental consequences of driving *on each individual* may be needed to strengthen the impact of the colour-coded labels and help introduce the environmental factor as a priority when choosing a car.
- Although the most recent label - the 'fridge/freezer design' - was preferred over the others tested in the focus groups because of its similarity with energy labels on domestic appliances and ease of use, the key difference between the two is how well they relate to running costs. With energy labels, the link is easy and quick to make, and this motivates people to buy a more efficient appliance, even though this may have a higher initial outlay. But this link is not so easy to make with the car label. For the environmental label to work, the connection between environmental cost (carbon emissions) and **personal** cost (e.g. fuel consumption) needs to be made more strongly.
- Whilst suggestions from sales staff for improvements mainly concerned adding supplementary information - such as VED/road tax amounts; customers' suggestions concerned making the label bigger and clearer - 'a bit more basic' as one customer remarked. For maximum clarity and impact, the labels need to be:
 - **Simpler**, with fewer numbers - 'less is more' when it comes to getting the message across about whether a car is relatively "green" and less harmful to the environment.

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- Show greater emphasis on **fuel consumption**, in a language people understand (the cost in Sterling and mileage in gallons, and without urban/ex urban/combined figures). When car drivers think about the financial costs of motoring - which *are* important for car buyers - they do not tend to think about CO₂ emissions.
- Seen as **independent**, and as being endorsed by a trusted organisation, such as Which?, RAC, AA, SMMT or TRL.¹
- Sales staff did not tend to show negative reactions to the label - they were generally either positive or neutral. The labels were commonly seen as providing useful additional information in a relatively simple layout. Moreover, the labels were recognised as being more 'official' than some of the current manufacturers' labels that are used. For some dealers, such as Ford, the pilot labels are easier to use than the current ones, which are specific to individual cars.
- Despite the high level of interest in comparative information and the fairly positive response to the A-G type label, highlighted by the focus groups and the quantitative survey, the showroom research found that, in practice, car buyers generally show little interest in using colour coded labels for comparing the **environmental performance** of cars. The reaction to the labels in showrooms confirmed the finding that emerged strongly throughout each stage of the research, that other factors - financial, performance, safety - are of much more importance to car buyers. Car buyers do not generally understand the role of car use in carbon emissions, and there is not enough incentive for them to learn more about how their choice of car can make a difference to the UK's carbon emissions. There is, however, wide interest in information about running costs and fuel efficiency, and this came through strongly in the quantitative research. This suggests that car buyers would show more interest in using comparative environmental labels if such labels placed greater emphasis on running costs and fuel efficiency, or with greater financial incentives to reduce carbon emissions.

¹ The AA and RAC are much better known than SMT or TRL, and this in large part explains why more car buyers would trust their endorsement of an environmental label. The quantitative survey found that 36% and 26% of car buyers trust the AA and RAC to produce an environmental label for new cars, compared with 13% for the TRL and 4% for the SMMT. The DfT is also relatively well trusted (36%).

Key Findings from the Focus Groups

Factors when buying a car

There are a number of factors which play a key role in the decision-making process when choosing which car to purchase. These include,

- **"Always wanted one"**
- **Vehicle type (size, layout etc.)**
- **Comfort (e.g. driving position, seating, suspension)**
- **Initial Cost / Affordability**
- **Performance / Power (negative and positive)**
- **Practicality (e.g. size, versatility)**
- **Reliability**
- **Reputation of make / Personal recommendation of car**
- **Running costs (e.g. fuel costs, insurance, VED, servicing)**
- **Safety features**
- **"Sales Package" (e.g. finance deal, free insurance, free servicing, extended warranty, breakdown cover, freebies)**
- **Style / Image (interior / exterior)**

Car buyers are unable to pinpoint a single key aspect which affects the ultimate purchasing decision (though cost considerations are almost always present). The final decision is made based on a combination of different criteria - most objective, but some subjective. The "ideal combination" of course varies from person to person and individual aspects can change in priority depending on the specific combination in question.

In addition to the aforementioned "essential aspects", there are also a number of less important factors that are seen as "nice-to-have" and can make one car more desirable than another if the combination of "essential aspects" is, on balance, equal. These non-essential factors include,

- **Additional interior style features (e.g. heated seats, air conditioning, climate control, sun-roof)**
- **Additional exterior style features (e.g. metallic paint, tinted glass, front fog lights)**
- **Colour**
- **"Gadgets" (e.g. navigation system, CD player, courtesy mirror, cup holder)**
- **Likely depreciation**
- **Power steering / Manoeuvrability**

The actual **cost** of the car affects which cars are initially considered. As a selection of cars are reviewed by the buyer, the cost consideration develops into a more sophisticated comparison, looking at various aspects including the,

- Available fuel types
- Likely depreciation

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- Available engine sizes
- Fuel consumption figures
- Maintenance costs
- VED tax band
- Insurance group

Following on from this, the **sales package** offered can often be the final "clincher" in the purchase decision. The sales package can vary not only from dealership to dealership, but also according to time of the month etc., and from salesperson to salesperson (depending on how much commission the sales person is prepared to sacrifice to win the sale). On brand new cars it can include various factors such as 0% finance, free insurance, free servicing, extended warranties, free breakdown cover and a multitude of possible complimentary extras including first-aid kit, fire extinguisher, metallic paint etc).

Car buyers are divided over the importance of **style and image** - referred to by many as the look or 'flashiness' of the car. Some choose cars because they are sporty or stylish, whilst others make a conscious decision to avoid buying flash cars, seeing their attractiveness to thieves as being "*not worth the hassle*" (Female, Leeds 2). However, image is not always important and this view is principally expressed by those who rank **reliability** and **safety** as key. Nonetheless, whether people see themselves as style conscious or not, the choices often stem from the initial visual appeal.

My wife said, "that's a nice blue colour," and it was all settled

- Male, Surbiton 2

I chose one car over another because it was the colour I liked

- Female, Brighton 1

The car's **driveability** is also an important factor and most car buyers will either make sure they have first-hand experience of driving the car before buying (e.g. a test drive) or will take account of the experience of relatives and friends. Driver and passenger experience is equally important to some and is expressed in terms of **comfort**, **quietness**, having **power steering** and/or an **automatic gearbox** and whether the car seems to be "**designed around passengers**". This is particularly true for those who frequently drive long distances.

Practicality is of major importance for people with families, people who need to transport animals (e.g. show dogs) and drivers who generally need a reasonable amount of space (e.g. to carry wheelchairs, sports equipment). Size, versatility (e.g. folding seats), accessibility (e.g. five-door rather than three-door) and towing ability can dominate the choice of car, especially for married professionals with young families. Whilst children can be included in the decision-making process, their priorities are often different to those of their parents and are consequently of little significance in the decision-making process.

Environmental performance or 'greenness' is rarely considered and at most it tends to be a non-essential bonus if the chosen car is deemed "green". Anyone considering buying a car which runs on alternative fuel (e.g. LPG/Petrol combo), is principally motivated to do so by the cost savings on fuel costs, rather than the desire to be "greener".

The reason for looking for better miles per gallon is because its cheaper, not because it's greener

Male, Surbiton 2

The main associations made with "green cars" surround fuel consumption, engine size and, in a very general sense, "emissions". There is very little awareness of cars being promoted for their environmental attributes and generally little spontaneous interest in knowing such information. In fact, some drivers see driving as the antithesis of being "green" - as driving a car implies making an environmental impact.

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No car is "green". Some are more "green" than others, but they are still polluting the atmosphere

- Male, Surbiton 2

Some reassurance is given by the belief - whether correct or not - among some that all new cars are better designed and consequently less harmful to the environment compared to older vehicles.

Your old car is going to be worse for the environment than the new one

- Female, Brighton 1

A similar train of thought also surrounds unleaded petrol, inasmuch as unleaded is so much cleaner than leaded petrol. However, mixed views are still evident in relation to the merits of diesel in environmental terms. The higher **visibility** of the emissions - coupled for some with a reluctance to handle the fuel - means that is it not always the "green" choice.

Concern about environmental impact and emissions is undermined by doubt that the choice of car will make any significant difference to global warming and air pollution, and this is particularly true of low mileage drivers. One participant argued that since petrol has become 'unleaded', there has been less interest in the environmental impact of car driving and in order to make the next significant difference to the environment, all cars need to be run on alternative fuels - and any intermediate measure is not worth the expense or hassle.

People became more environmentally aware when there was the push for catalytic converters running on unleaded - there was the changeover from leaded. That is when everyone became a bit more environmentally aware. Now it's just taken for granted, if you get a diesel, it's clean; if you use unleaded [rather than leaded] it is better. Now we have moved on from that. There are so many features [navigation system, climate control etc] on cars to think about now, the environment is not a key priority. There was a big drive about the environment at one point, but we have moved beyond that and until the oil companies let go of the power that they have got over the world, I do not think the environment is going to be a big issue again for a while. I mean where do we move on from here on the "environment issue"?

- Female, Leeds 1

Nonetheless, the environment is important enough to some people that they would, in theory, be prepared to pay more for a cleaner car. There are encouraging signs about the potential importance of environmental considerations, particularly among more affluent, young professionals with families. One participant who had considered a dual-fuel vehicle said,

I like to recycle bottles and tins, and would like to carry this through with the car... I bought a washing machine because it had a low environmental impact. I'd do the same for a car.

- Male, Surbiton 1

However, the cost of bi-fuel cars (particularly the conversions) is seen as prohibitive (given lack of awareness of grants), and the lack of refuelling stations is a serious problem. Such 'green' cars would have to be "a lot cheaper" than conventional vehicles to become attractive enough to buy by at least a reasonable minority.²

Motivations are multifaceted, and there are inevitable trade-offs. Some factors - like cost, style, reliability and practicality - are widely seen as essential, whilst others - like optional extras - are traded off against each other so that the best balance of advantages over disadvantages is achieved.

² Awareness of the option to switch to bi-fuel cars was shown by some men in the groups (4 or 5 out of the 20 or so men who participated in the 6 focus groups). However, understanding of the funding available for conversion was low – among men and women.

What is significant is that environmental performance - as measured in CO₂ emissions - **rarely figures at all** in people's thinking. When people do think about whether a car is 'green', they tend to do so in terms of **fuel consumption**, not carbon emissions.

Even more importantly, perhaps, is that even when people are challenged about environmental considerations, they are usually quite comfortable saying "it is not important to me". It seems that, for some, the notion that "green is good" is not even conventional wisdom.

Figure 2: Thinking about buying a car

Figure 2: Thinking about Buying a Car



Information used when buying a car

The time taken to choose a car varies greatly, from a matter of days in some cases (e.g. those who are replacing one favoured car with a newer model) to several years. This means that the sources of information used are many and varied. Commonly, people obtain information from car showrooms, the internet, friends and relatives and from car magazines (e.g. What Car? Top Gear) and TV programmes (e.g. Driven, Top Gear). Radio and newspaper advertising is also used to obtain information. Manufacturers' sales brochures are often taken and used, although these can be limited by the amount of technical information included and this is true also of company web sites, which say very little, if anything, about carbon emissions. There is also a problem in comparing sales brochures ("*There aren't standard paragraphs*", Male, Leeds 1), and car magazines are commonly used for this instead. Buyers are also somewhat sceptical of the reliability of the claims made in the manufacturers' brochures, so prefer to also source their own independent reviews.

Among those who spend a great deal of time thinking about the car they want to buy, environmental information is sought only rarely, and other factors tend to be much more important - whether this concerns style, safety or performance.

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My mind was I wanted a silver [Ford] Focus. So, I was only going to look at the silver pictures

- Female, Brighton 1

There appears to be little, if any, attempt made to highlight carbon emissions when people are in showrooms looking at cars.

When you go into a car salesroom and they ask you what kind of car you are looking for, they are just trying to sell you a car. They don't persuade you to buy a more fuel efficient or less polluting car

- Male, Surbiton 1

Whilst personal recommendation can be very important, friends and relatives do not tend to show an interest in the environmental performance of cars. When asked what friends and relatives had raised as issues when discussing their recent purchase, one participant remembered,

"Don't like where the reverse light is" - that was the only feedback we got

- Female, Brighton 1

Another described her friends as mainly interested in "the look, the style, the gizmos," and certainly not about carbon emissions or fuel consumption.

They don't ask what are the CO2 emissions. My friends don't even ask how many miles it does to the gallon.

- Female, Brighton 1

Consideration of Environmental Issues

Awareness & Understanding of Fuel Economy & Carbon Emissions

The relationship between inputs (fuel) and outputs (emissions) is only very generally - if at all - understood by most drivers. There is a poor understanding of the relationship between carbon dioxide emissions and fuel consumption. For many, being green is all about fuel economy, not carbon emissions. In this context, being green can bring cost savings and this is an opportunity for Government and the industry to raise the profile of "the environment factor". For example, few consider switching to a smaller engine because it will result in lower carbon dioxide emissions, but they may well consider doing so to improve their fuel economy. But when people consider engine size, they do not generally associate this with carbon emissions.

As mentioned, there is confusion about the relative benefit to the environment of diesel cars. Many think that unleaded petrol is 'green' and do not see an environmental benefit in buying diesel. Petrol is preferred for being cleaner to handle, cheaper and quieter (and not for performance). Diesel owners are motivated by the cost of fuel and lower depreciation, lower fuel consumption (miles per gallon) and durability. Any environmental benefit - which is disputed by some petrol drives - is a bonus, not an essential factor.

Awareness & Understanding of VED Bands

Awareness of the Vehicle Excise Duty (VED) **bands** is generally low, even though there is good awareness of road tax having gone down in recent years. Although it should be noted that awareness of the VED bands is quite strong in Leeds. Apart from this lack of awareness in Brighton and Surbiton, Leeds drivers do know that there are cost savings for less polluting cars, although most associate the link with having **smaller engines** and are not aware that VED is specifically based on fuel emissions.

When presented with the VED bands, the difference is not seen as significant enough to sway buying behaviour. Indeed, the incentives to change - whether tax, fuel differentials or price - are not valued worthwhile - a £40 difference in VED is "nothing" and has no influence on car buying decisions.

Concept Labels

Labelling: Understanding, Reactions & Improvements

The A-G Type Label based on CO₂ emissions (Concept Label Figure 3) was unanimously preferred over the other versions for two main reasons:

- Its similarity and consistent layout with the EU energy labels currently used on domestic appliances was widely (spontaneously) recognised and made consumers feel comfortable with the label
- The A-G bands clearly show relative differences between different grades, through a combination of colour and arrow length. By comparison, the VED 15 Boxes Label (Concept Label Figure 1), labelled by some participants as the "Dulux Wall Chart" was deemed to be too complicated and unclear. In fact, both groups in Leeds thought "*It looks like a Rubix cube*" (Female, Leeds 1 and Male, Leeds 2).

The main issue with the other two concept labels was the complicated design, which was immediately too off-putting and a barrier felt extremely difficult to overcome (given the latest disinterest in the subject). The VED 15 Boxes Label (Concept Label Figure 1) was preferred by some to the VED 5 Boxes Label (Concept Label Figure 2) as at least it made some effort to show the difference between different types of fuels on the same car. However, the colours used on the VED 15 Boxes Label were viewed to be not distinct enough to make a difference. Even with this issue resolved, consumers viewed it as being too complicated and limited because it does not imply which is best or worst.

The five box label, however, won some praise (in comparison with the other) for at least having a degree of simplicity (which is highly valued at this stage).

Despite the overwhelming preference for the A-G Type Label, there are a number of improvements which could be made to make the design clearer and enhance its appeal to car buyers. Most importantly, there is a need to reduce the amount of information on the label - consumers feel they are unlikely to read all the information and instead deem it as off-putting. With the additional space generated, more emphasis should be given to the coloured arrow / bar chart, which most think should be the main priority. The label is currently too complicated to be easily and quickly understood. To increase the chances of people taking an interest in them, the labels would only have to indicate whether the car is 'Good', 'Average' or 'Bad' for the environment; whether it is a 'High', 'Medium', or 'Low' a polluter. What the customer needs is, "*A quick handy guide to assist in making a decision,*" according to one participant (Male, Surbiton 1). Some said they did not need to know figures - just colours, with 'green for good', and 'red for bad', as explained on the EU energy label.

I don't understand the figures. The fact that it has got green against it, is that good?

- Female, Surbiton 2

You don't actually need numbers - just colours and length of arrow

- Female, Surbiton 1

There is an interest in relative performance on a scale. Given that dealerships and car showrooms can be quite intimidating places (or "quite intoxicating", as one participant noted) and that people must weigh up a great deal of information, this increases the need for simplicity of any carbon emission label. The reference to the EC Directive came across as obscure and is seen as unnecessary.

Unlike the energy labels used on domestic appliances, the link between efficiency and running costs (in this case, carbon emissions and fuel economy) is poorly understood, and this means that the

Comparative colour-coded labels for passenger cars

personal cost benefit of lower polluting cars does not come across as well as it could. This is caused by:

- the emphasis on VED, rather than fuel consumption, which is the main, and sometimes only, point of interest
- the lack of a year/date of issue
- concern about how the changing price of petrol affecting the accuracy of the estimates of fuel cost
- people still think in miles per gallon rather than km per litre
- purchases based either on a fixed **value** or a fixed **amount** of fuel (or just "filling it up")
- the urban/ex urban/combined figures
- Use of Sterling and Euro, of which the former is obviously preferred at this stage
- The text size being too small
- Lack of clarity / information about who endorses the label and a recognised symbol (e.g. "All tests undertaken by the Department of Transport and endorsed by Which?")

Using the Labels?

Around half expressed a general willingness to "take a look" at a label put on a car, and a number of suggestions were made for how they could be displayed:

- on the widescreen
- on a sample colour card relating to a larger (more detailed) sign in a showroom
- permanently on the car itself, whether in the engine bay, handbook or windscreen (There was a feeling expressed at one of the groups that any sticker would be taken off, but a plate in the engine bay might provide a more durable marker).
- people could take them home (as A4 leaflets/cards)
- in car sales brochures.

Some would take no interest in the label whatsoever however.

If I got this from the showroom, I'd sling it in a box with the brochure

- Female, Surbiton 1

Some felt that they would use the labels, and it might be the factor that could swing a decision to purchase a less polluting car, rather than another. Some even went as far as to say they "would definitely not" chose to buy a car that was given a red label (for not being environmentally friendly).

I would genuinely be influenced by colour coding... I would be more hesitant to buy red. I have my grandchildren to think of, and their future

- Female, Surbiton 1

Some people are open to persuasion:

If they told me, "This is a green car," it might have swayed me. I recycle everything because I feel I am doing something good

- Female, Surbiton 2

However, others expressed less interest in using the labels and some even showed resistance to them

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If it [a TVR] was green, I wouldn't buy it

- Male, Brighton 1

You wouldn't drive out of the showroom and say 'look what I've got'

- Male, Brighton 1

There is some doubt about whether the environmental labels would work, given the individualistic nature of car buying, and the importance of other factors. At present, the environmental label does not match car manufacturers' current advertising focus on "the macho image of driving through fire," as one male participant (Surbiton 2) described it. This is expressed in people's interest in style and performance.

By contrast, energy labels on domestic appliances are widely welcomed and used, and this stems from the importance of energy efficiency on running costs. A link is commonly seen, and a more efficient appliance can often be preferred, even if the initial cost is significantly higher and unlikely to be recouped quickly though savings in running costs.

There may be a need for the government to promote the labels in conjunction with an independent body. There was some scepticism about whether the information on the labels could be trusted, and doubt about who should endorse and promote the labels and whether the Government (and particularly the EU) can be trusted to regulate them. This feeling was connected with recent media attention to some car companies giving allegedly false fuel consumption figures. Some cited the MMR debate as further evidence of a lack of credibility with Government advice (and it has certainly been evident - in relation to environmental information - in other MORI research among both the public and media. In both cases, NGOs are by far the most trusted).

The Government could definitely lie on this, and I wouldn't trust it unless it had an independent body to verify it

- Male, Surbiton 1

The key to public reassurance is **independence**. To be taken seriously, the labels need to be seen as based on independent testing of carbon emissions. Spontaneous mentions for those who should be the arbiter of the labels include: Which?, RAC, AA, SMMT and TRL. Some did not welcome the EU symbol. Green campaign groups like the Green Party, Greenpeace and FOE were seen by many as too political and not technical enough.

Key Findings: Showroom Research

Interest in the Labels

The showroom research highlights limited interest among car buyers in environmental labels for cars. Information about emissions and VED/tax band payments is generally not high up in car buyers' priorities when thinking about which make and model of car to buy (even in a cost context, it is seen as generally insignificant in comparison with the purchase or financing costs, insurance etc). This is reflected in their interest in the labels and ratings of their usefulness to sales staff and to car buyers.

The level of interest shown by car buyers in the labels reflects their greater interest in other information, in particular **sales/finance packages** and **equipment levels**. Whilst information about fuel costs and running costs is important to many potential car buyers, this interest is less widespread compared with finance and equipment levels.

The low level of interest in the labels reflects the degree of importance of the environment for car buyers. The omnibus research found that no single factor is predominant when choosing the make and model of a car. Rather, it is the *combination* of different factors, specifications and features which makes one car preferable to another. The omnibus research highlighted a number of factors as generally more important than others - size/practicality, safety and the **costs** involved in running the car are essential. However, concern about the **environmental impact** was found to be negligible.

These findings were confirmed by showroom interviews with customers, which showed generally high interest in performance, safety and financial information, and much less interest in fuel consumption, fuel costs and emissions. This is reflected in the information sought from sales staff. This tends to relate to equipment levels, finance packages, performance. Few customers interviewed expressed interest in information about emissions or fuel consumption. Car buyers are generally not interested in fuel emissions or VED/tax band - with the exception possibly of company car drivers, who are more aware of the financial implications of emission bands - and this lack of interest is acknowledged by sales staff.

Car buyers' lack of interest in the labels - whether mounted on display units/pods next to cars or shown on the windscreen or inside windows - was reflected in an apparent lack of willingness among the sales staff to point them out. This was highlighted by the observation of customers and sales staff interacting in the showrooms. Few of the car buyers observed as part of this study showed interest in the labels, and sales staff reported customers as having limited interest in them. Around half of the customers who were interviewed (as they left the showroom) remembered seeing the label. Of those who were observed looking at the label, each spent less than 30 seconds looking at them.

Sources of Information

The findings from the showroom research support the conclusions from the focus group and omnibus survey research, which highlighted the wide variety of information currently available to car buyers. However, a number of sources of information stand out as being particularly important for car buyers: consumer guides and car magazines, dealerships/garages and car sales brochures. Family and friends are also important.

With the exception of manufacturers' literature for sales staff, many sources of information are commonly used by sales staff and potential car buyers, as outlined below.

Car Sales staff

- manufacturers' sales literature
- consumer guides and magazines

Car buyers

- dealerships/garages
- consumer guides and magazines

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- car sales brochures
- car sales brochures
- family & friends

There is wide interest among potential car buyers in referring to information found in **consumer guides**, **sales brochures** and on **web sites**, and this reflects the omnibus findings, which showed that car buyers are becoming increasingly savvy in comparing cars and consulting a wide range of sources of information.

In contrast, few customers interviewed as part of the showroom research said that they used car labels - such as those provided by the SMMT and manufacturers - and this supports the omnibus findings. Few customers were observed looking at the labels independently, or talking about them with sales staff. Whilst sales staff were generally happy to have the labels on hand, they did not tend to discuss them with customers because the labels do not reflect customers' main interests.

The showroom research demonstrates that most customers do not currently consider car labels to be a key source of information, and this has implications for the effectiveness of any label potentially introduced by the DfT.

Ratings of the Labels: Car Buyers

Whilst the omnibus research highlighted wide interest in using a label for comparing the environmental impact and fuel efficiency of different cars, the showroom research found that opinion among customers in car showrooms was more mixed. The showroom research demonstrates that whilst many car buyers say they would use an environmental label, few do so in practice. Whilst up to half of potential car buyers say they find information on fuel costs and carbon dioxide emissions of interest, only around half of those who looked at the environmental label (overall, a much lower proportion of all 'customers') in the showrooms found them useful.

Overall reactions among customers in the showrooms to the *format* of the pilot label support the findings from the omnibus survey. Few thought the style and appearance of the label should be changed. The main suggested improvements concerned making the label easier to understand through making the label clearer and bigger:

Separate out different areas of information

Male car buyer, 35-44 years

Bigger writing on 'fuel consumption', further info on fuel cost. The light green writing is difficult to read

Female car buyer, 35-44 years

Bigger size

Male car buyer, 35-44 years

Print was too small, print colour not bold enough, emission part hard to understand, what are the letter codings? They should be clearer

Male car buyer, 55+ years

A bit more basic

Female car buyer, 35-44 years

Some expressed a preference for alternative measurements of fuel economy:

Give alternative measurements, e.g. gallons

Male car buyer, 35-44 years

There was limited connection made between the pilot label and the style and format of energy labels currently used on domestic appliances. This similarity was highlighted in the focus groups and picked up by many people interviewed as part of the omnibus research. This connection came across less strongly in the showroom research, and one reason suggested for this is that the energy label used on domestic appliances is much more simplistic and easier to understand.

Ratings of the Label: Salesroom staff

Whilst car buyers' interest in information about emissions and VED/car tax is patchy, sales staff tend to be either neutral or positive towards the pilot label. Around half of the sales staff interviewed found the new label helped them 'a fair amount' in helping them sell cars, although a similar proportion said the label 'made no difference'.

The amount of information provided to car buyers can be considerable, and this has important implications for sales staff's use of environmental labels in showrooms. For example, Ford normally displays a standard environmental label for each car - with identifying chassis number - on car pods, underneath a 'spec sheet', detailing standard features, optional extras and on-the-road price. So, in addition to the information given on the colour coded label - regarding make/model, engine capacity, fuel type, transmission type, drive cycle (urban, extra-urban and combined), approximate fuel costs and carbon dioxide emissions - car buyers are also given up to twenty pieces of information on the spec sheet.

However, a number of advantages were noted by sales staff, in relation to the new (pilot) label in comparison with the existing SMMT label:

- additional information on fuel costs
- the new label seems more official
- simple format / layout

In addition, the new labels are seen as more flexible and easy to use because they are not identified with specific cars via their chassis number, unlike the present system used at Ford, whereby each car has its own environmental / emissions label.

One car salesperson noted,

[The colour coded label] is compact, not over-busy, not too detailed, a good bit of info that can only be of help.

There is little difference between how sales staff rate the usefulness of the SMMT label and the emissions label being piloted by DfT. Opinion on both labels tends to be positive or neutral, with both generally rated as being *fairly* useful or *very* useful in providing information on emissions and environmental information. Of the 20 salespeople interviewed as part of the showroom research, six found the SMMT/Manufacturer's label 'very useful', and a further nine said it was 'fairly useful' in giving information to customers about emissions and other environmental information (i.e. fifteen, or 75% found this label useful). By comparison, four salespeople found the DfT pilot label 'very useful', and ten found it 'fairly useful' (i.e. fourteen, or 70% overall found it useful).

There is some variation between sales staff in how often they say they draw their customers' attention to the colour-coded labels. Whilst some sales staff say they would point the labels out, others said they would do this rarely or not at all.

Sales staff generally rated the labels as fairly user-friendly and easy for customers to understand. Improvements suggested by sales staff included:

- putting a picture of the car on the label to draw customers' attention to it
- using up-to-date VED/road tax amounts to go with the VED banding
- providing information about recycling

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- taking out fuel costs, which were seen by one salesperson as causing concern among customers:

Take out approximate fuel costs - it scares customers

One disadvantage of the label that was noted by one car salesperson was the lack of comparative information on it:

Customers want to compare many cars, not just look at one vehicle. The label does not mean a great deal to customers

Appendices

Comparative Colour Coded Label

Figure 1: VED 15 Boxes label

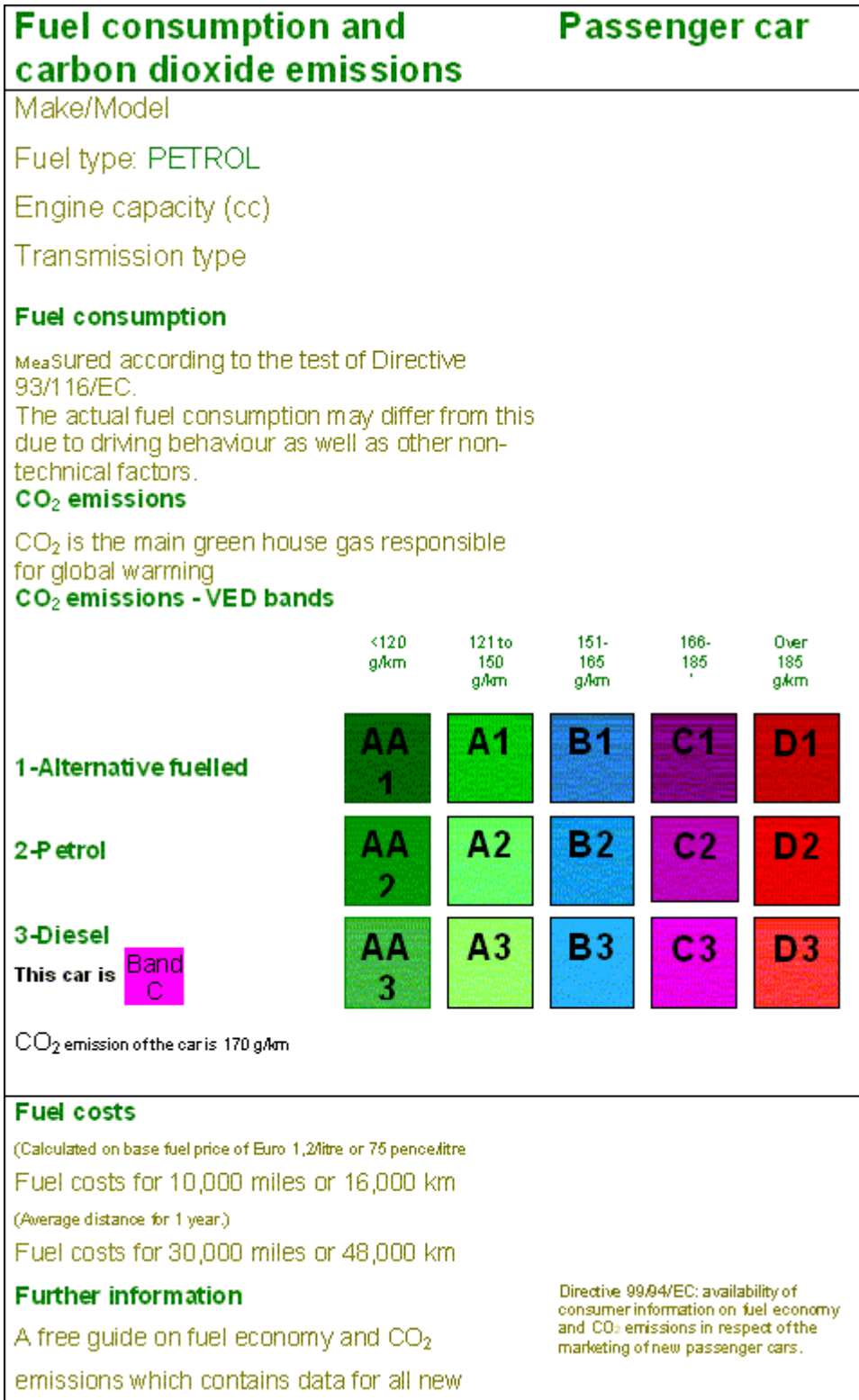
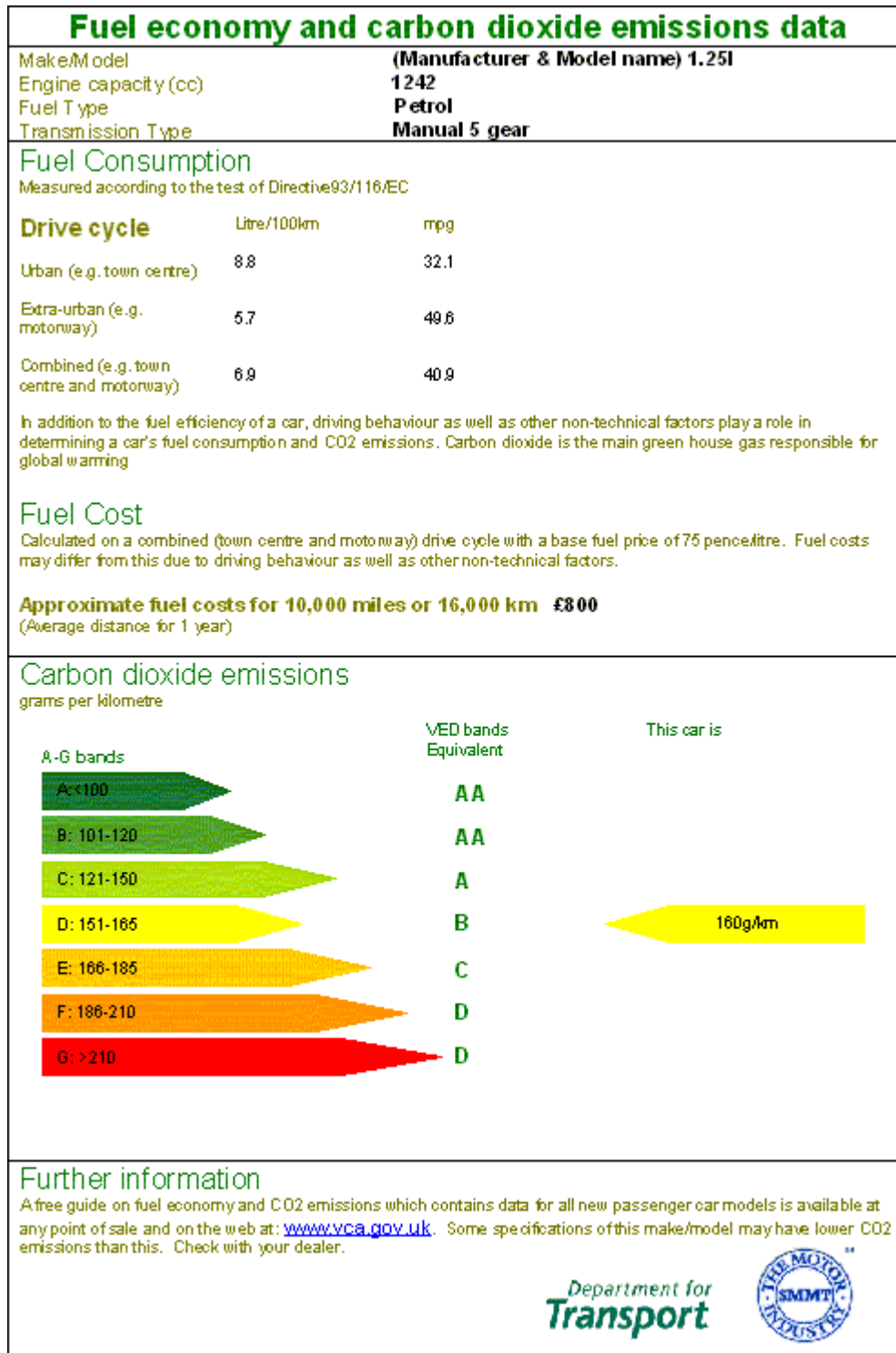


Figure 1: VED 15 Boxes label (Part 2)

Fuel consumption and carbon dioxide emissions		Passenger Car Petrol vehicle	
Make/Model			
Engine capacity (CC)			
Transmission Type			
Fuel consumption			
Measured according to the test of Directive 93/116/EC			
The actual fuel consumption may differ from this due to driving behaviour as well as other non-technical factors.			
Drive cycle	Litre/100km	Mpg	
Urban			

Figure 5: A-G label revised two



Topic Guide for Focus Groups

Topic guide Final - 24/10/02

Comparative colour-coded labels for passenger cars

Description	Notes	Mins
<p>Introduction</p> <p>Thank for coming</p> <p>Introduce self and MORI</p> <p>Housekeeping (toilets, fire exit, drinks)</p> <p>Stress confidentiality - MRS/ESOMAR codes</p> <p>Permission to tape record</p> <p>Explain viewing mirror</p> <p>Topic for discussion & client</p> <p>Participant introduction</p> <p>Warm-Up</p> <p>Brand New Purchasers Get each participant to describe the car they have at the moment - make, model and type (e.g. saloon, coupé) colour, engine size etc.</p> <p>Nearly New Purchasers* Get each participant to describe the car they have at the moment - make, model and type (e.g. saloon, coupé) colour, engine size etc.</p> <p>Intending Purchasers* Get each participant to describe the car they are looking to buy in the next 0-12 months - make, model and type (e.g. saloon, coupé) colour, engine size etc. If they have not considered it fully yet, get them to describe their ideal "dream" car.</p> <p><i>*NB Purchasers to include mix of those buying a car from commercial premises and vehicle retailers</i></p>	<p>Introduction and warm-up</p>	<p>10</p>

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Description	Notes	Mins
<p>Environmental Considerations</p> <p>Awareness & Understanding of Fuel Economy & Environmental Impact</p> <p>Discuss awareness of fuel economy differences - different fuel types (Petrol, Diesel, Liquefied Petroleum Gas -LPG, Compressed Natural Gas -CNG, Hybrid vehicles -Electric etc), different engine sizes, different types of car. What are they? Is larger, petrol always worse? Which is best?</p> <p>Environmental & Health impact - What are the impacts? Why are they a concern?</p> <p>Probe for:</p> <p><i>C02/Carbon Dioxide</i> (impt greenhouse gas affecting global warming)</p> <p>If time, also consider:</p> <p>NO₂/NO_x/Oxides of Nitrogen (invisible gas, can pose health risk - especially to those with respiratory illness + contributes to smog, acid rain + ground-level ozone formation. Significant air pollutant)</p> <p>Fine particles (can pose health risk -especially to those with respiratory disorders. Significant air pollutant)</p> <p>Carbon Monoxide (invisible gas, can pose health risk - especially to those with heart disease)</p> <p>HC/Un-burnt hydrocarbons (invisible gases which contribute to ground-level ozone formation. Some are carcinogenic and indirect greenhouse gases)</p> <p>Do environmental considerations affect decision to purchase? How much? Why/why not? At what stage during the decision-making process?</p> <p>Awareness & Understanding of VED Bands/Taxation Implication</p> <p>Awareness of different road tax bands & the actual term Vehicle Excise Duty (VED)</p> <p>What are the different bands? How do they vary? Do they know what theirs is?</p> <p>How are cars classified into the specific bands?</p> <p>Are you aware of company car tax? Can you explain what it is? Does it relate to the VED bands? How?</p> <p>Is VED band considered at purchase point + relative importance compared with other factors?</p>	<p>Looking at the awareness and importance of fuel economy and environmental impact</p> <p>Considering impact of VED bands</p>	<p>15-20</p>

Comparative colour-coded labels for passenger cars

Description	Notes	Mins
<p>Labelling</p> <p>Energy label -Awareness & Usage</p> <p>Unprompted awareness of EU energy labels on domestic appliances</p> <p>PROMPT WITH SHOWCARD SHOWING LABEL</p> <p>Assess awareness and usage? Experience of using labels - When? For what? Ease of understanding? What information is useful/not useful? Importance in purchase decision?</p> <p>Concept Car Label - Understanding, Reactions & Improvements</p>	<p>Provide context of current awareness, understanding and usage of energy labels</p>	<p>10</p>
<p>If you were to design a similar label for a car, informing you of fuel efficiency and environmental considerations, what information would you include? How would you present it? Where would you put the labels ? - Adverts? Brochures? Car windows in showrooms etc</p> <p>SHOW EACH OF THE THREE CONCEPT LABELS ONE AT A TIME, EXPLORING THE FOLLOWING FOR EACH</p> <ul style="list-style-type: none"> ■ First impressions? Content? Format? Ease of understanding? Eye-catching? Comprehensive? Too much detail? Use of information? What's good/bad? ■ What are the key messages from the label? ■ Is source and presentation of label trustworthy? What would make it more trustworthy/important? ■ Easy to compare? How could it be made easier to compare labels between different makes and models? ■ Preferred label? Why? What could be improved/added/removed? ■ Where is best place to show labels? -Brochure, windscreen, library database, Internet -Advantages/disadvantages? ■ What media could be used? Paper, sticker, credit-card style, digital display (allowing cross-model and make comparisons) etc Advantages/disadvantages for each? Preferences? <p>Explore likely usage of a car label? Why/why not? What could encourage usage? How could it be publicised/advertised? How would it be used? At what stage in the decision-making process? To what extent?</p>	<p>Preferences for a label</p> <p>Reactions to concept labels and suggested improvements</p> <p>Potential usage</p>	<p>25-30</p>
<p>Conclusions & Closure</p> <p>Anything else/questions? Thank group & issue payments/sign-off sheet</p>	<p>Summing up and closure</p>	<p>5</p>

Topline Results

DFT - Colour Coded Labels For Passenger Cars

Comparative colour-coded labels for passenger cars

Final Topline Results (Aggregated Results: Waves 1 - 3)

(10/04/03)

- Results are based on interviews with a representative quota sample of 5,763 adults aged 17+ in 201 sampling points across Great Britain.
- Interviews were conducted face-to-face, in-home between 6 - 10, 20 - 25 February 2003 and 6 - 12 March 2003
- Data are weighted to the known national population profile
- A '*' indicates a value greater than zero but less than half of one per cent
- Where percentages do not sum to 100%, this is because of multiple responses or computer rounding

Q1. Do you currently have a car which you had some say in choosing? As well as a car which you might personally own, this could include a company car or a shared car (again, if you had some say in the choice of it). SINGLE CODE ONLY

Base: All adults aged 17+ (5,763)	%
Yes	61
No	39
Don't know	*

Q2. SHOWCARD When was the car first registered? If you have more than one car, please answer the following questions on the newest car you have. By "newest", I mean the car which was manufactured most recently. SINGLE CODE ONLY

Base: All those with a car (3,347)	%
March 2003 - August 2003 ('03' Registration)	-
September 2002 - February 2003 ('52' Registration)	3
March 2002 - August 2002 ('02' Registration)	5
September 2001 - February 2002 ('51' Registration)	4
March 2001 - August 2001 ('Y' Registration)	5
September 2000 - February 2001 ('X' Registration)	5
Before September 2000 (Any other registration)	30
Don't know	47

Q3. Do you plan to get a brand new or nearly new car in the next twelve months. By "nearly new", I mean a car which was first registered on or after 1ST March 2001. SINGLE CODE ONLY

Base: All adults aged 17+ (5763)	%
Yes	12

Comparative colour-coded labels for passenger cars

No	85
Don't know	3

Q4. SHOWCARD **What is the make/manufacturer of the newest car that you have?** SINGLE CODE ONLY

Base: All those with a car (3,347)	%
Alfa Romeo	*
Audi	1
BMW	2
Citroën	4
Daewoo	1
Daihatsu	*
Fiat	4
Ford	19
Hyundai	1
Isuzu	*
Jaguar	*
Chrysler Jeep	*
Kia	*
Land Rover	2
Lexus	*
Lotus	*
Mazda	1
Mercedes-Benz	1
Mitsubishi	1
Nissan	5
Peugeot	7
Porsche	*
Renault	7
Rover/MG Rover	7
Saab	1
SEAT	1
Skoda	1

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Subaru	*
Suzuki	1
Toyota	4
Vauxhall	14
Volkswagen	6
Volvo	3
Other (Please Specify)	4
Don't know	*

Q5. SHOWCARD **What type of car is it?** SINGLE CODE ONLY

Base: All those with a car (3,347)	%
Hatchback	52
Saloon	28
Estate	8
MPV/People Carrier	4
4x4/Off-Road	3
Coupé	2
Convertible/Open top/Soft top	1
Other	1
Don't know	*

Q6. SHOWCARD **What is the engine size of the car?** SINGLE CODE ONLY

Base: All those with a car (3,347)	%
Less than 1 litre/Less than 1,000cc	3
1.0-1.3 litres/1,000-1,300cc	18
Over 1.3-1.6 litres/1,301-1,600cc	25
Over 1.6-1.8 litres/1,601-1,800cc	19
Over 1.8-2.0 litres/1,801-2,000cc	17
Over 2.0-2.5 litres/2,001-2,500cc	10
Over 2.5-3.0 litres/2,501-3,000cc	2
Over 3.0 litres/Over 3,000cc	2
N/A - I have a rotary engine/electric/hybrid car	0
Don't know	4

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Q7. SHOWCARD **What type of fuel does the car run on?** MULTICODE OK

Base: All those with a car (1,246)	%
Unleaded Petrol	82
Diesel	15
LRP/Lead-Replacement Petrol	3
LPG/Gas	*
Electric	-
Hybrid	-
Don't know	*

Q8. SHOWCARD **On average, how many miles do you personally drive per year in this car?**
SINGLE CODE ONLY

Base: All those with a car (3,347)	%
Under 3,000 miles	21
3,000-7,999 miles	32
8,000-12,999 miles	31
13,000-17,999 miles	7
18,000+ miles	6
Don't know	3

Q9. SHOWCARD (R) **When choosing this car, which of the following sources of information, if any, did you consult?** DO NOT PROMPT. MULTICODE OK

Base: All those with a car (3,347)	%
Salesman/Dealership	30
Friends/Family/Work Colleagues	25
Consumer Guides/Car magazines (e.g. Autocar, What Car?, Which?, Top Gear)	19
Car Sales Brochure & Specification Details	11
Garage/Mechanic	11
Newspaper Articles	9
Other web site (e.g. Manufacturer's web site, independent web site)	8
TV Programmes (e.g. Driven, Top Gear)	5
TV Adverts/Radio Adverts/Billboard Adverts	3
Car label (SMMT's/Manufacturer's)	2

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Government/Vehicle Certification Agency web site	1
Government/Vehicle Certification Agency guide book	*
Other (Please Specify)	4
No information consulted	24
Don't know	1

Q10. SHOWCARD (R) AGAIN Thinking about the next time you choose a car, which of the following sources of information, if any, do you think you might consult to help you decide which make and model of car to buy? DO NOT PROMPT. MULTICODE OK

Base: All those planning to get a car registered since 1st March 2001 (624)	%
Salesman/Dealership	35
Consumer Guides/Car magazines (e.g. Autocar, What Car?, Which?, Top Gear)	35
Friends/Family/Work Colleagues	27
Other web site (e.g. Manufacturer's web site, independent web site)	20
Car Sales Brochure & Specification Details	20
Newspaper Articles	13
Garage/Mechanic	12
TV Programmes (e.g. Driven, Top Gear)	10
Car label (SMMT's/Manufacturer's)	5
TV Adverts/Radio Adverts/Billboard Adverts	5
Government/Vehicle Certification Agency guide book	2
Government/Vehicle Certification Agency web site	2
Other (Please Specify)	2
Will not consult any information	8
Don't know	5

Q11. When you chose your current car, what factors were important in the decision-making process of choosing the make and model of which car to buy/have? DO NOT PROMPT. MULTICODE OK

Base: All those with a car registered since 1st March 2001 (533)	%
Size / Practicality (e.g. boot space, 5 door, number of seats, fold-down seats)	28
Price (cheap, affordable)	26
Reliability	21
MPG / Fuel Consumption	19

Comparative colour-coded labels for passenger cars

Comfort (e.g. comfortable driving position, seating, suspension)	16
Performance / Power (e.g. good acceleration, top speed)	12
Style/Appearance/Colour (interior, exterior)	11
Brand Name / Image / Style /Street Cred	11
Running Costs (unspecified)	11
Safety (e.g. air bags, anti-lock brakes, crash test rating)	10
Insurance Costs / Insurance Group	10
Personal Experience/Previous Experience	8
Equipment Levels (e.g. air conditioning, power steering, CD player, satellite navigation)	7
Engine Size - Medium / Large	6
Engine Size - Small	6
Dealership (e.g. location, prior experience, helpfulness)	6
Road Tax/Vehicle Excise Duty Band	5
Recommendation (e.g. friends, family, work colleagues)	6
Environmentally Friendly / "Green"	3
Emissions (e.g. Greenhouse effect, global warming, climate change: Carbon Dioxide, CO ₂ , Greenhouse gases)	3
Sales Package (e.g. freebies, discounted price, good interest rate, good credit deal, finance deal)	3
Emissions (unspecified)	2
Emissions (e.g. AIR QUALITY EMISSIONS: nitrogen oxides, particulates, sulphur dioxide)	2
Alternative Fuels (e.g. Hydrogen fuel, LPG, Gas, Electric)	2
Depreciation	2
Availability	*
Other (Please Specify)	2
Don't know	4

Q12. **And when you come to choose the make and model of your next car, which factors, if any, do you think will be important in the decision-making process?** DO NOT PROMPT MULTICODE OK

Base: All those planning to get a car registered since 1st March 2001(624)	%
Price (cheap, affordable)	28
Reliability	27

Comparative colour-coded labels for passenger cars

Size / Practicality (e.g. boot space, 5 door, number of seats, fold-down seats)	24
MPG / Fuel Consumption	21
Comfort (e.g. comfortable driving position, seating, suspension)	19
Brand Name / Image / Style /Street Cred	17
Running Costs (unspecified)	17
Style/Appearance/Colour (interior, exterior)	15
Insurance Costs / Insurance Group	13
Safety (e.g. air bags, anti-lock brakes, crash test rating)	11
Performance / Power (e.g. good acceleration, top speed)	10
Engine Size - Medium / Large	9
Engine Size - Small	9
Equipment Levels (e.g. air conditioning, power steering, CD player, satellite navigation)	7
Personal Experience/Previous Experience	7
Recommendation (e.g. friends, family, work colleagues)	5
Sales Package (e.g. freebies, discounted price, good interest rate, good credit deal, finance deal)	5
Depreciation	4
Emissions (e.g. Greenhouse effect, global warming, climate change: Carbon Dioxide, CO ₂ , Greenhouse gases)	4
Dealership (e.g. location, prior experience, helpfulness)	4
Emissions (e.g. Air Quality Emissions: nitrogen oxides, particulates, sulphur dioxide)	4
Alternative Fuels (e.g. Hydrogen fuel, LPG, Gas, Electric)	3
Road Tax/Vehicle Excise Duty Band	3
Environmentally Friendly / "Green"	2
Emissions (unspecified)	2
Company Choice	*
Other (Please Specify)	4
Don't know	3

Q13. SHOWCARD (R) 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? DO NOT PROMPT. MULTICODE OK CODE UP TO 3 RESPONSES

Comparative colour-coded labels for passenger cars

Base: All those who currently have/or are planning to get in the next 12 months, a car registered since 1st March 2001 (1,085)	%
Fuel consumption/mpg	65
Insurance costs	52
Servicing costs	31
Fuel type (e.g. Petrol, Diesel, LPG, Electric)	24
Cost of road tax / Vehicle Excise Duty	17
Cost of company car tax	9
Other	1
Don't know	1
None of these	8

Q14. Which, if any, of the environmental consequences of driving a car concern you the most?
DO NOT PROMPT. MULTICODE OK - CODE UP TO 3 RESPONSES

Base: All those who currently have/or are planning to get in the next 12 months, a care registered since 1st March 2001(1,085)	%
Low emissions/low pollution (Unspecified)	29
Emissions (e.g. Greenhouse effect, global warming, climate change: Carbon Dioxide, CO ₂ , Greenhouse gases)	27
Emissions (e.g. Air Quality Emissions: nitrogen oxides, particulates, sulphur dioxide)	23
Congestion	10
Road Safety	7
Noise	3
Fly-tipping/Disposing of scrapped cars	3
Other health impacts	3
Increase in Asthma sufferers	2
Smell	2
Other (Please Specify)	8
None of these	21
Don't know	5

Q15. People sometimes talk about cars being "green" or "environmentally friendly". Thinking about the idea of an environmentally-friendly car, what characteristics do you think it would need? DO NOT PROMPT. MULTICODE OK

Comparative colour-coded labels for passenger cars

Base: All those who currently have/or are planning to get in the next 12 months, a car registered since 1st March 2001(1,085)	%
Alternative fuels / Hydrogen fuel / LPG / Gas/Electric	32
Low emissions/low pollution (Unspecified)	28
Low fuel consumption / High mileage per gallon	23
Low emissions (e.g. Air Quality Emissions: nitrogen oxides, particulates, sulphur dioxide)	19
Low emissions (e.g. Greenhouse effect, global warming, climate change: Carbon Dioxide, CO ₂ , Greenhouse gases)	19
Recyclable	11
Environmentally-friendly manufacturing process	7
Small/Small Engine	4
Long-life/longevity of vehicle before it is scrapped	4
Safe (for drivers/passengers)	3
Catalytic converters	2
Quiet	2
Do not believe you can have an environmentally-friendly car/contradiction in terms	2
Unleaded fuel	2
Not sacrificed style / performance of an ordinary car	1
Safe (for pedestrians)	1
Not heavy / Light	1
Diesel	*
Carry more passengers	*
Other (Please Specify)	2
Do not know	12

Q16. SHOW LABEL & SHOWCARD (R) There is currently a proposal that a label be introduced on new and nearly new cars that will explain to potential buyers how (VERSION 1 = "Environmentally-friendly", VERSION 2 = "Fuel Efficient") that car is. Looking at this label, how important, if at all, might such a label be in helping you decide which make and model of car to buy/have? ALLOW AMPLE TIME TO LOOK AT LABEL. SINGLE CODE ONLY

Base: All those who are currently have/or are planning to get in the 12 months, a car registered since 1st March 2001	Version 1	Version 2
	"Environmentally Friendly"	"Fuel Efficient"
	(519)	(566)
	%	%

Comparative colour-coded labels for passenger cars

Very important	29	30
Fairly important	43	44
Not very important	13	13
Not at all important	10	8
Don't know/Depends	5	5

Q17. How, if at all, could the label be improved to make the information clearer/easier to understand and more useful to car buyers when deciding which make and model of car to buy/have? PROBE FULLY FOR WHAT COULD BE ADDED/REMOVED/CHANGED

ANY ANSWER (WRITE IN AND CODE '1)

Base: All those who currently have/or are planning to get in the next 12 months, a car registered since 1st March 2001 (1,085)	%
Make clearer / easier to understand	19
Provide more information	18
Change style / appearance	8
None / no answer	32
Don't know / no particular reason	31

See computer tables for a detailed summary

Q18. SHOWCARD (R) I am now going to read out five different types of information which the label might give people who are deciding which car to buy/have. In each case, I would like you to tell me how useful, if at all, this information might be to you. MULTICODE OK ROTATE LIST

Base: All those who currently have/or are planning to get in the next 12 months, a car registered since 1st March 2001 (1,085)		Very useful	Fairly useful	Not very useful	Not at all useful	Don't know/ Depends
		%	%	%	%	%
A	Information allowing you to compare which vehicles have the lowest carbon dioxide/CO2 emissions, the gas which contributes to the greenhouse effect and global warming/climate change	48	37	7	5	2
B	Information allowing you to compare which vehicles have the lowest air quality emissions, such as nitrogen oxides, particulates and sulphur dioxide, which cause local pollution in urban areas	40	38	13	6	3

Comparative colour-coded labels for passenger cars

C	Information allowing you to compare which vehicles are the cheapest to run	62	27	6	3	2
D	Information allowing you to compare which vehicles are the safest	68	24	4	2	2
E	Information allowing you to compare which vehicles have the highest content of recyclable material	22	40	22	14	2

Q19. SHOWCARD (R) **Which of these, if any, do you think are the best ways of displaying such a label in a car showroom or on a forecourt to show how 'green' or environmentally-friendly different cars are?** MULTICODE OK

Base: All those who currently have/or are planning to get in the next 12 months, a care registered since 1st March 2001 (1,085)	%
Removable label on the car windscreen	57
In the sales brochure	32
In the car's handbook	29
A4 Cards / Leaflets to take home	20
Stamped permanently onto the engine	17
Other (Please Specify)	1
Don't know	4

Q20. SHOWCARD (R) **Which of these organisation(s), if any, would you most trust to produce such a label?** CODE UP TO THREE

Base: All those who currently have/or are planning to get in the next 12 months, a care registered since 1st March 2001(1,085)	%
Department for Transport	36
AA	36
Which? Magazine	29
RAC	26
Environmental group	21
Car manufacturer(s)	14
TRL / Transport Research Laboratory	13
Government/British Government	13
EU / European Union / European Commission	11
Energy Saving Trust	10
Society of Motor Manufacturers and Traders / SMMT	4

Comparative colour-coded labels for passenger cars

Other (Please Specify)	1
No-one	1
Don't know	4

Q21.A For all new cars registered since 1st March 2001, the amount of Vehicle Excise Duty/VED you pay - or Road Tax as it is usually known - is linked to the carbon dioxide / CO2 exhaust emissions of your vehicle. Were you aware of this when choosing the make and model of the car we talked about earlier, or not? SINGLE CODE ONLY

Base: All those with a car registered since 1st March 2001 (533)	%
Yes	59
No	38
Don't know/Can't remember	3

Q21.B For all new cars registered since 1st March 2001, the amount of Vehicle Excise Duty/VED you pay - or Road Tax as it is usually known - is linked to the carbon dioxide / CO2 exhaust emissions of your vehicle. Were you aware of this, or not? SINGLE CODE ONLY

Base: All those who currently do not have a car registered since 1st March 2001 and who plan to buy one in the next 12 months (339)	%
Yes	48
No	45
Don't know/Can't remember	8

Q22. Did you look at that particular model's carbon dioxide / CO2 exhaust emission rating before you chose the car we talked about earlier, or not? SINGLE CODE ONLY

Base: All those with a car registered since 1st March 2001 (533)	%
Yes	28
No	70
Don't know/Can't remember	2

Q23. SHOWCARD (R) How important, if at all, was the Vehicle Excise Duty/VED classification, in choosing which make and model of car to buy/have? SINGLE CODE ONLY

Base: All those with a car registered since 1st March 2001 and who were aware of the VED system when choosing their car (314)	%
Very important	17
Fairly important	29
Not very important	29

Comparative colour-coded labels for passenger cars

Not at all important	24
Don't know	1

Q24. SHOWCARD Your car's Vehicle Excise Duty/VED classification determines the amount of Vehicle Excise Duty/Road Tax you pay. Per year, how much, if at all, would you need to save on your annual VED/Road Tax payment, in order for it to make a difference in choosing which make and model of car to buy/have? RECORD EXACT AMOUNT IN POUNDS AND CODE BELOW

Base: All those who currently have/or are planning to get in the next 12 months, a car registered since 1st March 2001 (1,085)	
No amount / Would not make any difference	46%
Don't know	23%
Mean	£119
Adjusted mean excluding those mentioning an amount above the maximum VED payment	£61

Checklists and Questionnaires

Interview with Salesperson

Interview with Salesperson (Page 1 of 8)

MORI/18161

09/05/03

INTERVIEW WITH SALESPERSON

As you know, we have been commissioned by the Department for Transport to talk to potential car buyers and salespeople about car buying. After accompanying you today, I would like to ask you some questions about your experience of car labelling and customers' purchasing habits.

I would like to assure you that all the information we collect will be kept in the strictest confidence, and used for research purposes only. It will not be possible to identify any particular individual or address in the results.

ASSURE WE ARE NOT WORKING FOR SHOWROOM/MANUFACTURER & MRS CODES OF CONDUCT

QA Approx. how many customers do you deal with in-person on an average day (based on today's day of the week)?

Enter number _____

Write in day of week _____

Interviewer Declaration

I confirm that I have carried out this Interview face-to-face with the named person of the address attached and that I asked all the relevant questions fully and recorded the answers in conformance with the survey specification and within the MRS Code of Conduct and the Data Protection Act 1998.

Signature:

Interviewer Name (CAPS):

Questionnaire No

Showroom Name:

Salesperson Name:

Interviewer Number /

Interview with Salesperson (Page 2 of 8)

Comparative colour-coded labels for passenger cars

MORI/18161

09/05/03

ASK ALL

Q1.a Firstly, which makes and models of cars are you principally responsible for selling in this showroom? PLEASE WRITE IN

()

Q1.b In an average month, what proportion of the cars sold at this dealership are new and what proportion are used?

ENTER IN %. MUST EQUAL 100%	%
New	_____
Used	_____

()

Q2. Where do you usually get your information about the cars you sell? DO NOT PROMPT. MULTICODE OK

Consumer Guides/Car magazines (eg Autocar, What Car?, Which?, Top Gear)	1
Newspaper Articles	2
TV Programmes (eg Driven, Top Gear)	3
TV Adverts/Radio Adverts/Billboard Adverts	4
Friends/Family	5
Other people in the trade	6
Dealership	7
Manufacturer sales literature aimed at sales staff	8
Car label (SMMT's/Manufacturer's)	9
Factory/Site visits	0
Previews of new models for sales staff	X
New DfT Pilot Label	Y
Car Sales Brochure & Specification Details aimed at customers	1
Government/Vehicle Certification Agency guide book	2
Government/Vehicle Certification Agency website	3
Other website (eg Manufacturer's website, independent website)	4
Other (PLEASE WRITE IN AND CODE '5')	5
Don't know	6

()

Interview with Salesperson (Page 3 of 8)

MORI/18161

09/05/03

Q3. **How long have you been a car salesperson**

a) For this manufacturer?

b) In total?

ENTER IN YEARS, IF LESS THAN 1 YEAR, WRITE 0

IF DON'T KNOW CODE 'X'

WRITE IN NUMBER OF YEARS	A) MANUFACTURER	B) IN TOTAL
Don't know	X	X

()

Q4. SHOWCARD A (R) **How useful, if at all, is the current SMMT/Manufacturer's label to you when giving information to customers about emissions and other environmental information? THIS IS THE LABEL WHICH WAS USED BEFORE THE DFT LABEL WAS PILOTED**

Q5. SHOWCARD A (R) AGAIN **How useful, if at all, is the new DFT label being piloted in the showroom at the moment to you when giving information to customers about emissions and other environmental information? SINGLE CODE ONLY**

	Q4	Q5
	()	()
Very useful	1	1
Fairly useful	2	2
Not very useful	3	3
Not at all useful	4	4
Don't know	5	5

Q6. **What, if any, are the most important things that customers want to know about when buying a car? DO NOT PROMPT. MULTICODE OK**

Q7. **Before your showroom started piloting the new Dft label, what, if anything, did customers generally want to find out about when they are looking at cars? DO NOT PROMPT. MULTICODE OK**

	Q6	Q7
Fuel consumption	1	1
Fuel costs	2	2
Car safety	3	3
EMISSIONS (eg AIR QUALITY EMISSIONS: nitrogen oxides, particulates, sulphur dioxide)	4	4
EMISSIONS (eg GREENHOUSE EFFECT, GLOBAL WARMING, CLIMATE CHANGE: Carbon Dioxide, CO ₂ , Greenhouse gases)	5	5
EMISSIONS (generally, unspecified)	6	6
Performance (e.g. acceleration, top speed)	7	7
Financial information / Sales Packages/Financing/Discounts/ "Deals"	8	8
VED/Tax band	9	9
Trade-in/Part-exchange value of existing car	0	0
Delivery time	X	X
SIZE/PRACTICALITY(Number of doors/How much room it has got)	Y	Y
Available options/colours/specifications	1	1
Other (PLEASE WRITE IN)	2	2
Nothing	3	3
Don't know	4	4

()

Comparative colour-coded labels for passenger cars

MORI/18161

09/05/03

Q8. SHOWCARD B (R) Generally speaking, how much interest, if any, do customers show in the pilot labels being used at your dealership? SINGLE CODE ONLY

A great deal	1
A fair amount	2
Not very much	3
None at all	4
Don't know	5

()

Q9.a Generally speaking, do customers look at the pilot label of their own accord? SINGLE CODE ONLY

Yes, look at label independently	1
No	2
Don't know	3

()

Q9.b SHOWCARD C (R) Generally speaking, how often, if at all, do you ever draw customers' attention to the pilot label? SINGLE CODE ONLY

Always	1
Usually	2
Sometimes	3
Rarely	4
Never	5
Don't know	6

()

Q10. SHOWCARD D (R) I am going to read out some information areas included in the pilot labels. How much interest, if any, do customers on the whole show in these information areas, whether it be by questioning you, or looking at the pilot label itself? Firstly... READ OUT A-H. ALTERNATE ORDER. TICK START. SINGLE CODE ONLY. NOTE NOT ALL THESE AREAS ARE NECESSARILY INCLUDED ON THE PILOT LABEL

		Very interested	Fairly interested	Not very interested	Not at all interested	Different for each customer	Don't know	
<input type="checkbox"/>	A ...Fuel consumption	1	2	3	4	5	6	()
	B ...Fuel costs	1	2	3	4	5	6	()
	C ...Car safety	1	2	3	4	5	6	()
	D ...CO2 EMISSIONS (eg GREENHOUSE EFFECT, GLOBAL WARMING, CLIMATE CHANGE: Carbon Dioxide, CO ₂ , Greenhouse gases)	1	2	3	4	5	6	()
	E ...Performance (e.g. acceleration, top speed)	1	2	3	4	5	6	()
	F ...Financial information / Sales Packages	1	2	3	4	5	6	()
	G ...VED/Tax band	1	2	3	4	5	6	()
<input type="checkbox"/>	H ...Equipment levels	1	2	3	4	5	6	()

Interview with Salesperson (Page 5 of 8)

Comparative colour-coded labels for passenger cars

MORI/18161

09/05/03

Q11. SHOWCARD E (R) How easy or difficult is it for customers to understand the pilot label? SINGLE CODE ONLY

Very easy	1
Fairly easy	2
Neither easy nor difficult	3
Fairly difficult	4
Very difficult	5
Don't know	6

()

Q12. What information on the pilot label, if any, do customers show most interest in? DO NOT PROMPT. MULTICODE OK

VED band / Tax band	1
Fuel consumption	2
Fuel costs	3
CO2 Emissions	4
Other (PLEASE WRITE IN AND CODE '5')	5
Nothing	6
Don't know	7

()

Q13. What is it about the style and format of the pilot label, if anything, that customers most like? DO NOT PROMPT. MULTICODE OK

Looks like fridge/freezer label	1
Colours/Coloured bands	2
Information on fuel cost	3
Information on fuel consumption	4
Simple format/clear	5
Other (PLEASE WRITE IN AND CODE '6')	6
Nothing	7
Don't know	8

()

Interview with Salesperson (Page 6 of 8)

Comparative colour-coded labels for passenger cars

MORI/18161

09/05/03

Q14. **What, if anything, do customers like least about the pilot label?** DO NOT PROMPT.
MULTICODE OK

Too complicated / Not clear / Should be made simpler / Should be made clearer (any mention)	1
Not in plain English / Too technical	2
Too little information (any mention)	3
Too much information (any mention)	4
Font size too small / Difficult to read	5
Too many colours / Colours confusing	6
No comparisons	7
VED bands confusing	8
A-G bands confusing	9
Rural vs extra urban confusing	0
Other (PLEASE WRITE IN AND CODE '1')	X
Nothing	Y
Don't know	1

()

Q15. **SHOWCARD F (R) In general, how much importance do customers place on the information contained on the pilot label when talking to you?** SINGLE CODE ONLY

A great deal	1
A fair amount	2
Not very much	3
None at all	4
Don't know	5

()

Q16. **I am now going to read out some statements about how much the pilot label helps or hinders you in selling cars. Please tell me which one, if any, comes closest to your own view.** READ OUT A-E. ALTERNATE ORDER. TICK START. SINGLE CODE ONLY

<input type="checkbox"/>	A	...It helps me a great amount	1
	B	...It helps me a fair amount	2
	C	...It makes no difference	3
	D	...It hinders me a fair amount	4
<input type="checkbox"/>	E	...It hinders me a great amount	5
		Don't know (DO NOT READ OUT)	6

CONTINUE

GO TO Q18

()

Interview with Salesperson (Page 7 of 8)

MORI/18161

09/05/03

ASK Q17 IF CODED 1-5 AT Q16. ANYONE CODING CODE 6 AT Q16 GO TO Q18

Q17. **Why do you say that the pilot label (RESPONSE AT Q16) when selling cars? PROBE FULLY**

.....

.....

.....

.....

.....

.....

ANY ANSWER (WRITE IN AND CODE '1)
Don't know / nothing 0

ASK ALL

Q18. **How, if at all, could the pilot label be improved to make the information clearer/easier for customers to understand and more useful to them when deciding which make and model of car to buy/have? PROBE FULLY FOR WHAT COULD BE ADDED/REMOVED/CHANGED**

.....

.....

.....

.....

.....

.....

ANY ANSWER (WRITE IN AND CODE '1)
Don't know / nothing 0

Q19. **And how, if at all, could the pilot label be improved to make it easier for you to use when showing people different cars? PROBE FULLY FOR WHAT COULD BE ADDED/REMOVED/CHANGED**

.....

.....

.....

.....

.....

.....

ANY ANSWER (WRITE IN AND CODE '1)
Don't know / nothing 0

GO TO DEMOGRAPHICS

Interview with Salesperson (Page 8 of 8)

MORI/18161

09/05/03

RESPONDENT DETAILS/DEMOGRAPHICS

Questionnaire No

Showroom Name:

Salesperson Name:

Interviewer Number /

IT IS VERY IMPORTANT THAT YOU FILL IN THE SAMPLE POINT NUMBER, QUESTIONNAIRE NUMBER AND INTERVIEWER NUMBER ON BOTH THE FRONT AND BACK PAGE OF THE QUESTIONNAIRE.

Name/Initial/Title: Mr/Mrs/Ms/Miss _____

Job title _____

Showroom Name and Address: _____

Full Postcode _____

Telephone Number Work: _____

Gender	
Male	1
Female	2

Customer - Age	
PLEASE WRITE IN	
17-24	1
25-34	2
35-44	3
45-54	4
55+	5
Refused	6

Interview with Customers

Interview with Customers (Page 1 of 7)

MORI/18161

09/05/03

INTERVIEW WITH CUSTOMERS

Good morning/afternoon/evening, My name is from MORI, the opinion polling and research company. We have been commissioned by the Department for Transport to talk to potential car buyers about car buying. I see you've been looking at cars/a car here today, could you please spare 10 minutes to answer some questions please?

I would like to assure you that all the information we collect will be kept in the strictest confidence, and used for research purposes only. It will not be possible to identify any particular individual or address in the results.

ASSURE NOT WORKING FOR SHOWROOM/MANUFACTURER ETC

ENSURE RESPONDENT IS DECISION MAKER OF CAR BUYING IF MORE THAN ONE IN PARTY, THIS MAY NOT NECESSARILY BE THE ULTIMATE MAIN DRIVER OR PERSON PAYING FOR THE CAR. THROUGHOUT "CUSTOMER" RELATES TO THE MAIN DECISION MAKER IN BUYING THE CAR, NOT NECESSARILY THE PERSON PAYING FOR THE CAR

CONFIRM CAR RECORDED AT Q3 ON CUSTOMER CHECKLIST IS CAR BEING REVIEWED BY CUSTOMER. IF NOT AMEND CUSTOMER CHECKLIST

Interviewer Declaration

I confirm that I have carried out this Interview face-to-face with the named person of the address attached and that I asked all the relevant questions fully and recorded the answers in conformance with the survey specification and within the MRS Code of Conduct and the Data Protection Act 1998.

Signature:

Interviewer Name (CAPS):

Customer interview No:

Showroom Name:

Interviewer Number /

Interview with Customers (Page 2 of 7)

Comparative colour-coded labels for passenger cars

MORI/18161

09/05/03

ASK ALL

Q1. **Firstly, do you plan to get a brand new car in the next twelve months?** SINGLE CODE ONLY

Yes	1	CONTINUE
No	2	THANK AND CLOSE
Don't know	3	

ASK Q2 OF ALL PLANNING TO GET A NEW CAR IN THE NEXT 12 MONTHS (CODE 1 AT Q1). OTHERS CLOSE

Q2. **Who will be involved in deciding which car to get?** DO NOT PROMPT. MULTICODE OK

Me	1
Husband/wife	2
Children	3
Friends	4
Colleagues	5
Don't know	6

Q3. **Will this car be a company car?**

Yes	1
No	2
Don't know	3

Q4. **SHOWCARD A And which engine size(s) are you considering?** MULTICODE OK

A	Less than 1 litre/Less than 1,000cc	1
B	1.0-1.3 litres/1,000-1,300cc	2
C	Over 1.3-1.6 litres/1,301-1,600cc	3
D	Over 1.6-1.8 litres/1,601-1,800cc	4
E	Over 1.8-2.0 litres/1,801-2,000cc	5
F	Over 2.0-2.5 litres/2,001-2,500cc	6
G	Over 2.5-3.0 litres/2,501-3,000cc	7
H	Over 3.0 litres/Over 3,000cc	8
I	Rotary engine/electric/hybrid car	9
	Don't know	0

Q5. **Are you looking to buy an Unleaded Petrol car, a Diesel or another type of fuelled car?** MULTICODE OK

Unleaded Petrol	1
Diesel	2
Electric	3
Hybrid/Dual fuel	4
LPG/Gas	5
Don't know/Don't mind/Depends	6

Q6. **SHOWCARD B On average, how many miles do you think the main driver of this car will drive per year?** SINGLE CODE ONLY

Under 3,000 miles	1
3,000-7,999 miles	2
8,000-12,999 miles	3
13,000-17,999 miles	4
18,000+ miles	5
Don't know	6

Interview with Customers (Page 3 of 7)

Q7. Before coming to this showroom today, which sources of information, if any, did you consult about a possible new car purchase? DO NOT PROMPT. MULTICODE OK

Consumer Guides/Car magazines (eg Autocar, What Car?, Which?, Top Gear)	1
Newspaper Articles	2
TV Programmes (eg Driven, Top Gear)	3
TV Adverts/Radio Adverts/Billboard Adverts	4
Friends/Family/Work Colleagues	5
Dealerships/garages	7
Car label (SMMT's/Manufacturer's/DfT Pilot)	8
Car Sales Brochure & Specification Details	9
Government/Vehicle Certification Agency guide book	0
Government/Vehicle Certification Agency website	X
Other website (eg Manufacturer's website, independent website)	Y
Other (PLEASE WRITE IN AND CODE '1)	1
No information consulted	2
Don't know	3

()

Interview with Customers (Page 4 of 7)

Comparative colour-coded labels for passenger cars

MORI/18161

09/05/03

- Q8. What information, if any, were you hoping to find out about today from your visit to the showroom to help you decide which make or model of car to buy? DO NOT PROMPT. MULTICODE OK
- Q9. And what information about the car, if any, is most important to you when deciding which make or model to buy? DO NOT PROMPT. MULTICODE OK
- Q10. SHOWCARD C (R) And which, if any, of these did you obtain information on from the dealership/salesperson today?

		Q8	Q9	Q10
A	Fuel consumption	1	1	1
B	Fuel costs	2	2	2
C	Car safety	3	3	3
D	EMISSIONS (eg AIR QUALITY EMISSIONS: nitrogen oxides, particulates, sulphur dioxide)	4	4	4
E	EMISSIONS (eg GREENHOUSE EFFECT, GLOBAL WARMING, CLIMATE CHANGE: Carbon Dioxide, CO ₂ , Greenhouse gases)	5	5	5
F	EMISSIONS (generally, unspecified)	6	6	6
G	Performance (e.g. acceleration, top speed)	7	7	7
H	Financial information / Sales Packages/ Financing	8	8	8
I	VED/Tax band	9	9	9
J	Company car tax payable	0	0	0
K	Equipment levels	X	X	X
L	Running costs/Insurance costs/Serviceing costs	Y	Y	Y
	Other (PLEASE WRITE IN AND CODE '1)	1	1	1
	Nothing	2	2	2
	Don't know	3	3	3

()

- Q11. SHOW PILOT LABEL FOR NEXT QUESTIONS Do you remember seeing this label when you were looking at the car today? SINGLE CODE ONLY

Yes	1	CONTINUE
No	2	GO TO DEMOGRAPHICS
Don't know	3	

()

ASK Q12 IF REMEMBER SEEING LABEL (CODE 1 AT Q11). OTHERS GO TO DEMOGRAPHICS

- Q12. Where was this label displayed? DO NOT PROMPT SINGLE CODE ONLY

On a display unit/pod next to the car	1
On the windscreen	2
Other (PLEASE WRITE IN AND CODE '3)	3
Don't know/Don't recall	4

()

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Q13. What information on the label, if any, was of most interest to you? MULTICODE OK

Road Tax/VED band / Tax band	1
Fuel consumption	2
Fuel costs	3
CO2 Emissions	4
Other (PLEASE WRITE IN AND CODE '5)	5
Nothing	6
Don't know	7

()

Q14. SHOWCARD D (R) Overall, how useful was the label to you when thinking about which car to buy? SINGLE CODE ONLY

Very useful	1
Fairly useful	2
Not very useful	3
Not at all useful	4
Don't know	5

()

Q15. SHOWCARD E (R) How likely, if at all, might it be to influence which make and model of car you decide to buy/have? SINGLE CODE ONLY

Very likely	1
Fairly likely	2
Not very likely	3
Not at all likely	4
Don't know/Depends	5

()

Q16. What was it about the style and format of the label, if anything, that you most liked? DO NOT PROMPT. MULTICODE OK

Looks like fridge/freezer label	1
Colours/Coloured bands	2
Information on fuel cost	3
Information on fuel consumption	4
Simple format/clear	5
Other (PLEASE WRITE IN AND CODE '6)	6
Nothing	7
Don't know	8

()

Interview with Customers (Page 6 of 7)

MORI/18161

09/05/03

RESPONDENT DETAILS/DEMOGRAPHICS

Customer interview No:

Showroom Name:

Interviewer Number /

IT IS VERY IMPORTANT THAT YOU FILL IN THE CUSTOMER INTERVIEW NUMBER, SAMPLE POINT NAME ON BOTH THE FRONT AND BACK PAGE OF THE QUESTIONNAIRE.

Name/Initial/Title: Mr/Mrs/Ms/Miss

Address: _____

Full Postcode

Telephone Number Home: _____

Work: _____

Customer - Gender

Male	1
Female	2

Customer - Age

PLEASE WRITE IN

17-24	1
25-34	2
35-44	3
45-54	4
55+	5
Refused	6

Will main driver also be the customer/decision maker?

Yes/Combined	1
No	2
Don't know	3

Occupation of Chief Income Earner

Position/rank/grade _____

Industry/type of company _____

Quals/degree/apprenticeship _____

Number of staff responsible for _____

Customer – Social Class

PLEASE WRITE IN

Salesperson Observation List

Salesperson Observation List (Page 1 of 3)

MORI/18161

09/05/03

SALESPERSON OBSERVATION CHECKLIST

COMPLETE A SEPARATE CHECKLIST FOR EACH CUSTOMER DEALT WITH BY SALESMAN DURING ACCOMPANIMENT SESSION. PLEASE TRANSFER SALESPERSON NAME FROM THIS CHECKLIST ONTO THE ASSOCIATED SALESPERSON INTERVIEW QUESTIONNAIRE. PLEASE AIM TO GET AT LEAST 5 CHECKLISTS FOR EACH SALESPERSON INTERVIEWED

Questionnaire No

Showroom name:

Salesperson name:

Interviewer Number /

Q1. SHOWROOM LOCATOR DETAILS

Name of Manufacturer	
Showroom contact name/ Showroom Manager	
Salesperson's name and job title	
Showroom name & address	

Region classification of showroom

South East	1
South West	2
East Anglia	3
East Midlands	4
West Midlands	5
North East	6
North West	7
London	8

Q2. START TIMES

USE 24 HR
CLOCK (EG 1345)

ENTRY TIME OF CUSTOMER INTO SHOWROOM WRITE IN	
START TIME OF LOOKING AT CARS WRITE IN	
START TIME OF TALKING TO SALESMAN WRITE IN OR NOTE IF "NOT APPLICABLE"	
START TIME WHEN FIRST STARTED LOOKING AT LABEL WRITE IN OR NOTE IF "NOT APPLICABLE"	

Salesperson Observation List (Page 2 of 3)

MORI/18161

09/05/03

Q3. Which makes and models of car(s) is/are being viewed by the customer at this showroom?

()

Q4. Are there other people with the customer? SINGLECODE ONLY. THIS ONLY INCLUDES PEOPLE WHO ARE WITH THE CUSTOMER, NOT THE SALESPERSON OR OTHER CUSTOMERS

Yes	1	CONTINUE
No	2	GO TO Q6
Don't know	3	

ANSWER IF CODE 1 AT Q4. OTHERS GO TO Q6

Q5. **Excluding the customer, how many people are in the party/group looking at this car?** WRITE IN NUMBER OF PEOPLE PER AGE GROUP. ONLY INCLUDE PEOPLE WITH THE CUSTOMER, NOT THE SALESPERSON/OTHER CUSTOMERS

Number of adults (17+ years)	_____
Number of children (aged approx 10-16 years)	_____
Number of children (aged approx 0-9 years)	_____
Don't know	4

ASK ALL

Q6. How, if at all, was the pilot label seen? Did the car dealer show the pilot label to the customer, did the customer notice the pilot label without prompting, or did the customer not notice the pilot label at all? SINGLE CODE ONLY

Yes, was shown the label	1	
Yes, noticed the label without prompting	2	CONTINUE
No, did not notice the label	3	GO TO Q10
Don't know	4	

()

ANSWER IF CUSTOMER SHOWN/LOOKED AT LABEL (CODES 1 OR 2 AT Q6). OTHERS GO TO Q10

Q7. Did the customer look at the pilot label on one instance only, or did they take more than one look at the pilot label? SINGLECODE ONLY

One look only	1	GO TO Q9
More than one look	2	CONTINUE
Don't know	3	GO TO Q9

()

Salesperson Observation List (Page 3 of 3)

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ANSWER IF CUSTOMER LOOKED AT LABEL ON MORE THAN ONE INSTANCE (CODE 2 AT Q7). OTHERS GO TO ROUTING INSTRUCTION BEFORE Q9

Q8. **How many times did the customer look at the pilot label?** SINGLECODE ONLY

ENTER NUMBER OF TIMES

ANSWER IF CUSTOMER SHOWN/LOOKED AT LABEL (CODES 1 OR 2 AT Q6). OTHERS GO TO Q10

Q9. **On the first instance of looking at the pilot label, how much time did the customer spend looking at the pilot label?** SINGLE CODE ONLY

Less than 30 seconds	1
Over 30 Seconds, up to 1 minute	2
Over 1 minute, up to 2 minutes	3
Over 2 minute, up to 5 minutes	4
Over 5 minutes	5
Don't know	6

ASK ALL

Q10. **Did the customer and sales person discuss the pilot label?** SINGLE CODE ONLY

Yes	1	CONTINUE
No	2	GO TO Q12
Don't know	3	

IF YES AT Q10, ANSWER Q11, OTHERS GO TO Q12

Q11. **From what you could see, was any conversation about the pilot label largely initiated by the sales person or the customer, or was it difficult to tell?** SINGLE CODE ONLY

Largely initiated by the salesman	1
Largely initiated by the customer	2
Difficult to tell	3

ASK ALL

Q12. **EXIT TIMES**

USE 24 HR
CLOCK (EG 1345)

**TIME WHEN FINISHED
LOOKING AT LABEL ON LAST
OCCASION**

WRITE IN OR NOTE IF "NOT
APPLICABLE"

**TIME CUSTOMER(S)
STOPPED LOOKING AT THE
CAR**

WRITE IN

**TIME CUSTOMER(S)
STOPPED TALKING TO
SALESPERSON**

WRITE IN OR NOTE IF "NOT
APPLICABLE"

**TIME CUSTOMER(S) STARTED
TO EXIT SHOWROOM**
WRITE IN

Customer Checklist

Customer Checklist (Page 1 of 3)

CUSTOMER CHECKLIST

NB: WE ARE ONLY INTERESTED IN CUSTOMERS WHO ARE LIKELY TO BE BUYING BRAND NEW CARS IN THE NEXT 12 MONTHS.

CHECKLISTS ARE ONLY COUNTED AS COMPLETED IF ACCOMPANIED BY A COMPLETED INTERVIEW FOR THE CUSTOMER CONCERNED. PLEASE TRANSFER CUSTOMER INTERVIEW NO. FROM THIS CHECKLIST ONTO RESPONDENT'S INTERVIEW QUESTIONNAIRE .

Customer interview No

Showroom Name:

Interviewer Number /

Q1. SHOWROOM LOCATOR DETAILS

Name of Manufacturer	
Showroom contact name/ Showroom Manager	
Showroom name & address	

Region classification

South East	1
South West	2
East Anglia	3
East Midlands	4
West Midlands	5
North East	6
North West	7
London	8

Q2. START TIMES

USE 24 HR
CLOCK (EG 1345)

ENTRY TIME OF CUSTOMER INTO SHOWROOM WRITE IN	
START TIME OF LOOKING AT CARS WRITE IN	
START TIME OF TALKING TO SALESMAN WRITE IN OR NOTE IF "NOT APPLICABLE"	
START TIME WHEN FIRST STARTED LOOKING AT LABEL WRITE IN OR NOTE IF "NOT APPLICABLE"	

Customer Checklist (Page 2 of 3)

MORI/18161

09/05/03

Q3. Which makes and models of car(s) is/are being viewed by the customer at this showroom? PLEASE WRITE IN

()

Q4. Is the customer by him/herself or not? SINGLECODE ONLY. THIS ONLY INCLUDES PEOPLE WHO ARE WITH THE CUSTOMER, NOT THE SALESPERSON OR OTHER CUSTOMERS

Yes, by him/herself	1	GO TO Q6
No, with other people	2	CONTINUE
Don't know	3	GO TO Q6

ANSWER IF CODE 2 AT Q4. OTHERS GO TO Q6

Q5. Excluding the customer, how many people are in the party/group looking at this car? WRITE IN NUMBER OF PEOPLE PER AGE GROUP. ONLY INCLUDE PEOPLE WITH THE CUSTOMER, NOT THE SALESPERSON/OTHER CUSTOMERS

Number of adults (17+ years)	_____
Number of children (aged approx 10-16 years)	_____
Number of children (aged approx 0-9 years)	_____
Don't know	_____

ASK ALL

Q6. How, if at all, was the pilot label seen? Did the car dealer show the pilot label to the customer, did the customer notice the pilot label without prompting, or did the customer not notice the pilot label at all? SINGLE CODE ONLY

Yes, was shown the label	1	
Yes, noticed the label without prompting	2	CONTINUE
No, did not notice the label	3	GO TO Q9
Don't know	4	

()

ANSWER IF CUSTOMER SHOWN/LOOKED AT LABEL (CODES 1 OR 2 AT Q6). OTHERS GO TO Q9

Q7. How many times did the customer look at the pilot label? SINGLECODE ONLY

One look only	1
More than 1 look, ENTER NUMBER OF TIMES	_____
Don't know	X

()

Customer Checklist (Page 3 of 3)

MORI/18161

09/05/03

ANSWER IF CUSTOMER SHOWN/LOOKED AT LABEL (CODES 1 OR 2 AT Q6). OTHERS GO TO Q9

Q8. **On the first instance of looking at the pilot label, how much time did the customer spend looking at the pilot label? SINGLE CODE ONLY**

Less than 30 seconds	1
Over 30 Seconds, up to 1 minute	2
Over 1 minute, up to 2 minutes	3
Over 2 minute, up to 5 minutes	4
Over 5 minutes	5
Don't know	6

()

ANSWER ALL

Q9. **Did the customer and sales person discuss the pilot label? SINGLE CODE ONLY**

Yes	1	CONTINUE
No	2	GO TO Q11
Don't know	3	

()

IF YES AT Q9, ANSWER Q10, OTHERS GO TO Q11

Q10. **Was any conversation about the label largely initiated by the sales person or the customer, or was it difficult to tell? SINGLE CODE ONLY**

Largely initiated by the salesman	1
Largely initiated by the customer	2
Difficult to tell	3

()

ANSWER ALL

Q11. **EXIT TIMES**

USE 24 HR
CLOCK (EG 1345)

**TIME WHEN FINISHED
LOOKING AT LABEL ON LAST
OCCASION**

WRITE IN OR NOTE IF "NOT
APPLICABLE"

**TIME CUSTOMER(S)
STOPPED LOOKING AT THE
CAR**

WRITE IN

**TIME CUSTOMER(S)
STOPPED TALKING TO
SALESPERSON**

WRITE IN OR NOTE IF "NOT
APPLICABLE"

**TIME CUSTOMER(S) STARTED
TO EXIT SHOWROOM
(BEFORE APPROACHED FOR
GUERRILLA INTERVIEW)**

WRITE IN