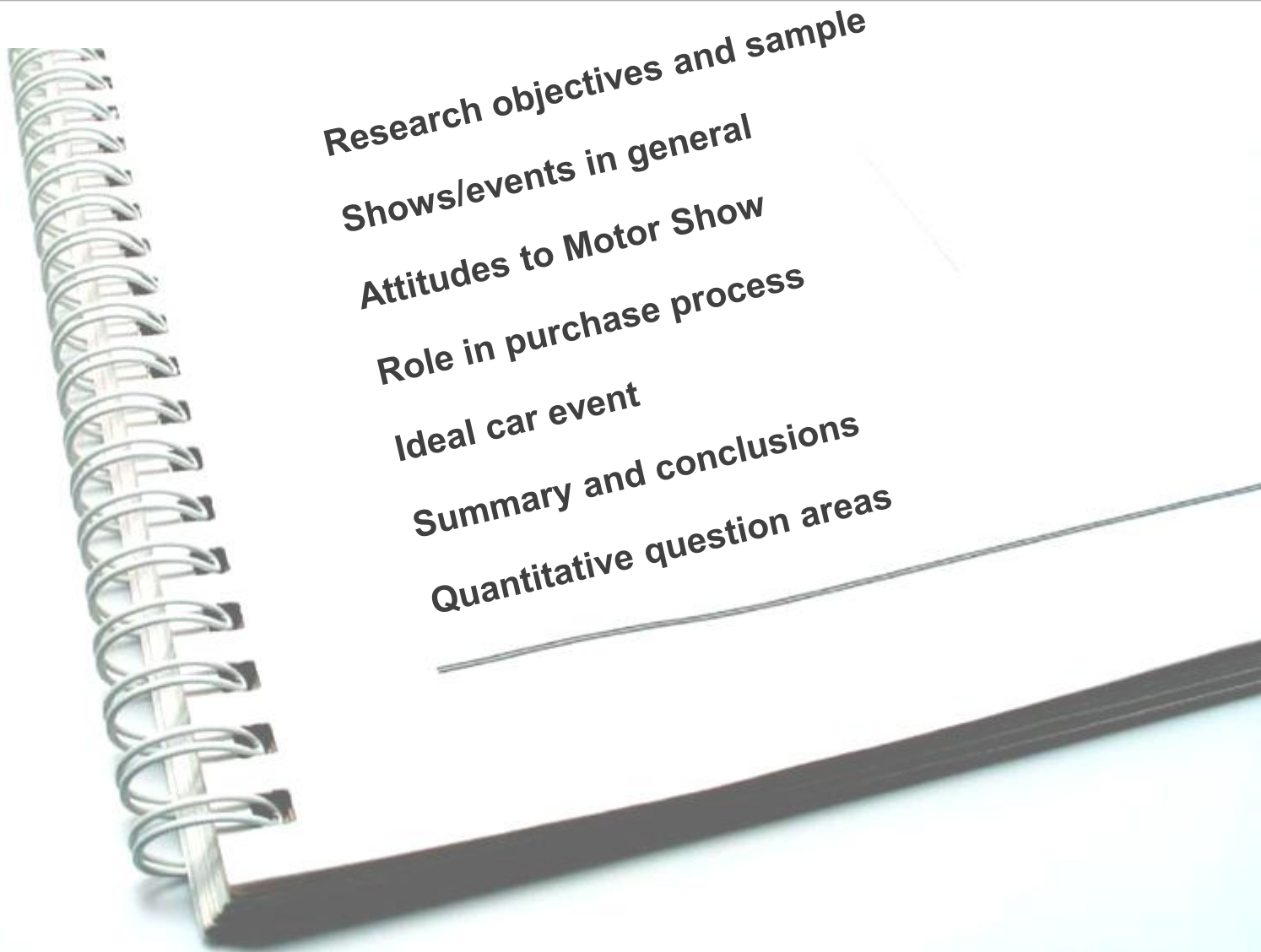




Developing the UK Car Show

SMMT & the UK car industry

Qualitative debrief June 7th 2010

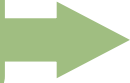


Research objectives and sample



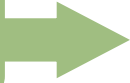
Research objectives

Experiences



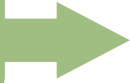
What is the feedback from prior experience of shows both car and other?

Expectations



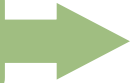
What do non attendees expect a car show to offer and for whom?

Behaviours



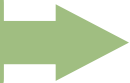
What have people done, what do they expect to do at a show?

Motivations



Why did people attend, why would they want to attend, what are they looking for?

Building the ideal event



How would they design and advocate their ideal car show and what role would it play?

Information used to help SMMT determine feasibility of future event

Research sample



4 x Male Groups

20-40yrs
Attended previous
Motor Show/other

40-60 yrs
Attended previous
Motor Show/other

30-50 yrs
Not attended previous
Motor Show/other

35-55 yrs
Premium owners
(spent £15-35k)
Change cars at least
every 3 years
2 to have attended
previous Motor
Show/
other



2 x Female Groups

30-50 yrs
Not attended
Motor Show

30-50 yrs
Small Premium owners (spent £15-35k)
Change cars at least every 3 years
2 to have attended previous Motor Show

Key criteria

- All to be considering purchasing a new car in next 12 months within appropriate budgets - i.e. 'in market'
- Non rejecters of Motor Shows
- Primary decision makers
 - Company car drivers must have a choice of at least 3 makes

Mix of attendees and non attendees and all in market.

Shows/events in general



Shows and events had a number of overlapping roles

Role of shows and events

- Main events (Ideal Home, Gadget show, Car events) were primarily social occasions:
 - The subject matter provided focus that removed some of the pressure:
 - Spend day together without spending every minute together!
 - Could provide bonding opportunities (for male friends particularly important, but also women and families)
 - Going every year could become family/friendship group tradition
- These occasions also provided inspiration and ideas for practical application:
 - For home (Grand designs/Ideal Home Show)
 - For weddings
- They were also help, develop and stimulate hobbies and interests

Fun and inspiration not purchase were reasons for attending.

Role of shows and events

- Some appealed more to/were more associated with one gender but there was still a general expectation of breadth and range:
 - Expectation that focus would be on enjoyment rather than serious knowledge accumulation
 - Provoke and inspire not 'teach'
 - Not just 'looking' but opportunities for involvement/engagement via imaginative elements
 - Growing expectation of facilities for children
- Cost was expected to be significant (not exorbitant) and whole day expected to be filled as a result:
 - Assumed that cost would include all/most of events/stalls

Attitudes to Motor Show/Car Events



For attendees, the Motor Show was as day out with families or friends

The motor show was a ‘good day out’, male orientated but inclusive

- It was a good day out/weekend trip - and , a male-oriented but not male exclusive one:
 - Go with mates or family (especially if had sons)
 - Bonding opportunity for fathers and sons:
 - “I always looked forward to taking my sons, when they got in to cars”
- It was an opportunity “to live, breathe, talk cars” - concept cars, performance cars, regular cars and classic cars
- There was, however, some frustration voiced about the lack of freedom to get close to the cars

A good day out but wanted to get closer to the cars.

For attendees, the Motor Show was as day out with families or friends (2)

Attendees view of motor show

- Overall attendees felt there was a sense that there was more to do at Motor Show than people realised - and willing to defend it!
 - Live events not just stationary exhibits e.g. Top Gear show, celebrity appearances
 - More family content e.g. Go carts
 - Car related technology/accessories not just cars:
 - “No freebies any more but you don’t go home empty handed”
- It was also an opportunity to:
 - Update their knowledge/keep abreast of new models and developments
 - New technologies and advances/car gadgets

Attendees keen to point out that there is more to Motor Show than people might think

For attendees the Motor Show was as day out with families or friends (3)

Attendees view of motor show

- Like a visit to theme park, but for grown men:
 - Plan the day, seeing the busy things first
 - See as much as you can to get sense of good value
 - Feel completely exhausted by end of day (and not ready to come again for another year!)
- Some aware that atmosphere changed after dark:
 - “The music gets louder, the families leave and the beer starts to flow”
- Although there was acknowledgement that Motor Show needed to change, there was also resistance to idea of ‘diluting’ the experience:
 - In favour of additional interest areas for women/families, rather than feminizing existing content

Attendees acknowledge need for change but favour evolution not revolution

Motor Show simultaneously too specialized and too general

Non attendee audience

- Perceptions of male dominated audience in testosterone fuelled atmosphere
- Preponderance of car nuts:
 - “Geeky men looking at cars they will never be able to afford”
- Or families consisting of men ‘indoctrinating their sons’
- Concept cars, premium brands and top of the range models:
 - “Even the Focus will be the souped up, loaded version...nothing like the one you’d end up buying”
- Perceptions rooted in past:
 - “A girl in bikini draped over the bonnet of a Jaguar”
- Mixed perspectives of to what extent cars could be purchased but not necessarily environment they would feel comfortable purchasing in

Most petrol-headed car event attendees

- Goodwood Festival of Speed and other events had crystallised what was lacking in motor show
 - No real contact interactions with cars - kept at arms length
 - Static displays/lack of motion
 - No “smell of petrol, roar of engines” - lacking atmosphere of car track
- On top of this there was sense that some of glamour and prestige had been lost:
 - Lack of prestige launches
 - Loss of status compared to Geneva and Frankfurt (to lesser extent)
 - Top Gear was the modern version of the motor show
- These changes reflecting those in Motor industry:
 - Less British cars being made
 - Cars less distinctive/less big launches
 - Perilous state of manufacturers/economy

Danger of Motor Show falling between two stools?

Inclusion expected but little excitement

- More car focused a little cynical of green content:
 - “Car enthusiasts are not the greenest people in the world”
 - Some barely suppressed antipathy towards green drivers: - “If you look at the car through its whole life, the Prius it is less environmentally sound than a Hummer!”
- However, it was green was firmly on the automotive agenda and inclusion was felt to be inevitable - in fact exclusion would send negative statement:
 - Some interest in breakthroughs/new technologies
 - Needs to work harder than other exhibits to engage
 - The ultimate green exhibit would be a green car that was good to drive!
- Lack of green content may confirm some of the negative associations of the Motor Show (all about performance, macho etc)

Green content necessary but did not quicken the pulse

Female groups view of motor show

- Motor show not on most women's radar:
 - Attendance consideration driven by husbands suggestion as 'family day 'out
 - Claimed never to know when it was on, commented on lack of publicity/do not feel event is aimed at or 'interested' in them
- Often no conscious rejection, just lack of consideration
 - Peripheral interest in cars enough to justify a family day out (and ideas for these welcomed)
 - For some younger respondents it was quite cool to be into cars (Top Gear, ladette identity)
 - Some needed reassurance that event was not the 'petrol- head' focused occasion they expected
 - Experience of other events (Ideal Home Show especially) meant positively inclined to these sort of days out
- However, need to reassure than models not longer draped over bonnets!

Any future event has to speak directly to women to rebut assumptions of male focus

Entrenched myths about car shows are a barrier

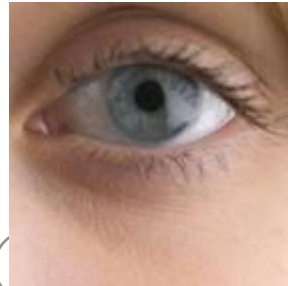


These perceptions are most entrenched with female audiences and need to be explicitly rebutted to broaden appeal.

Cars are for all the senses



**Leather
Petrol
Fumes**



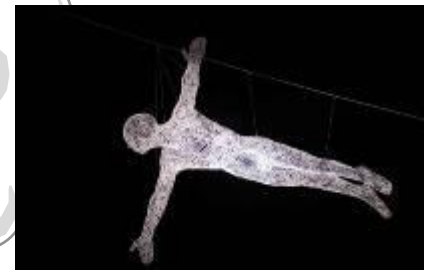
Beauty

**Engine
Power
Revving
Speed**



**Body
Fabric
Interior**

**Speed
Riding
Racing
Driving**



Both male and female audiences talked about the sensory gratification of cars.

Cars need to be brought to life and seen in their natural environment



Increasing expectation that car events need to somehow capture this (Goodwood does)

People want to move up the experience ladder at these events



Look



Getting in the driving seat



Starting up



Driving

Even just being able to sit in the car, goes a long way to experiencing it.

Car showrooms have also improved with high spec interiors and some experiential



Show rooms and also the offer of a range of driving experiences such as Mercedes Benz World



This further challenges car events to 'be more'.

The Motor Show was a little past it prime ?

Motor show peak has passed?

- Amongst attendees there was an awareness that the Motor Show had not taken place last year
 - This was often believed to be short term recession measure
 - Most expected it to come back
- However, there was underlying sense that show's peak had passed across sample:
 - British cars no longer the presence they were
 - Geneva show more and more the premium car event
 - Some awareness amongst attendees that some major manufacturers were missing at the last show
 - In this context Switching of locations may seem like desperation

Attendees had noticed its absence.

The Motor show was a little past it prime? (2)

Motor show peak has passed?

- Whether it continues or not some sense that British Motor Show was a little 'passe':
 - The name itself (Motor not car) could seem a little out of date, especially in full iteration ('British Motor Show')
 - Word association often reflect 1950/60's British - E Type jag and fur coats
 - Car journalism/events with 'attitude' (Top Gear and Goodwood) seemed much more contemporary
- However, for some there was some nostalgia about these associations - more innocent times when it was still Great Britain (producing great cars!):
 - "Why does everything have to change, to modernize? Some things should just stay as they are!"
 - Were keen not lose another British tradition!

Consensus that Motor Show needs to be updated

The way people talk/engage with cars has changed



Car show rooms

- High spec displays
- Offering more than before
- Includes driving experiences



British Motor Show

- Male
- Non critical/neutral
- Models draped over bonnets
- Establishment
- Car buffs



Top Gear/Goodwood

- Unisex
- Irreverent/opinionated
- Celebrity driven
- Ironic and post modern
- Mainstream and populist
- Experiential exhilaration

Expectations of the experience have increased both at show room and car event level.

Price perceptions

- Points of comparison were other ‘day outs’ including events such as the Ideal Home Show and theme parks
- Most felt around £20 - £30 per person, around £80 -100 for family of four would be reasonable:
 - Assuming all events within were covered (like in theme park)
 - Food and drinks on top
- Sense of good value seemed to be driven by:
 - Range of exhibits/shows/happenings
 - Spending the whole day/feeling of tiredness at end of full day
 - What new things they had seen/learnt
- In terms of value main source of complaint tended to be food/drink:
 - “The catering is always the weak link in these places...over priced and average”
- Calls for greater range of quality and price e.g. Champagne bar and full service restaurants as well as ‘snacks on the go’/fast food (and everything in-between)

Current perceptions of price did not really emerge as a barrier to going.

Location and venue was very subjective

- Realistic that only a few venues were of sufficient size to house Motor Show
- Little passion expressed in pros and cons of Excel Vs Earls Court
 - “Excel is great big hangar” (lacks atmosphere)
 - Disagreement as to which was easier to reach (subjective)
- Some nostalgia for Birmingham NEC event, and (remember North London location of research!) not necessarily seen as vastly less convenient than London locations
- However, there was strong call for **some sort of outside element** (especially vocal from those with experience of Goodwood Festival of Speed):
 - Allow for greater, bigger events, ideally race track and events
 - Would ease sense of ‘cabin fever’
- Idea of regional ‘test drive’ road show had some appeal but this would not be the ‘Motor Show’

But for some outdoor element was important.

Role in purchase process



Motor Show is “for dreaming about cars not buying them”

Role of motor show in purchasing?

- Approaches to the car selection process varied within the groups:
 - *“I develop a checklist that the car should have...tends to point to a shortlist of 2 or 3...then it is down to the showrooms...”*
 - *“I saw our car...a Seat Leon Cupra, in the car park at the gym”*
- Car buffs were ‘always’ in the market to some degree, always thinking about their next car with sense of anticipation
- Whereas others found the pressure of such a big purchase stressful

Approaches to car purchase vary

Role of motor show in purchasing?

- However, there were commonalities across the spectrum:
 - Background internet research (models, price and spec)
 - Visits to showroom for test drives were a mandatory part of process:
 - Either to get sense of how the car drives and/or do due diligence (irresponsible to spend so much without test drive)
 - Although some feeling that dealer experience had improved, particularly in premium brand showrooms, the test drive remained a an unpleasant experience ‘like driving test’ (this more readily voiced by women)
 - **Car events did not play a direct role/were never mentioned spontaneously as being part of the process**

Car shows did not feature in the discussions around purchase process

Motor Show as influencer

- Attendees acknowledged motor show could have a role as influencer - opportunity to impact perceptions, to take a look at new models:
 - Attendees very 'open' to new impressions (more so than later on in process?)
 - Role can be likened to general car magazine that contributes to sum of knowledge (rather Parkers which is used nearer sharp end of process)

The connection between Motor Show and purchasing is indirect.

Motor Show can play influencer role (2)

Motor Show as influencer

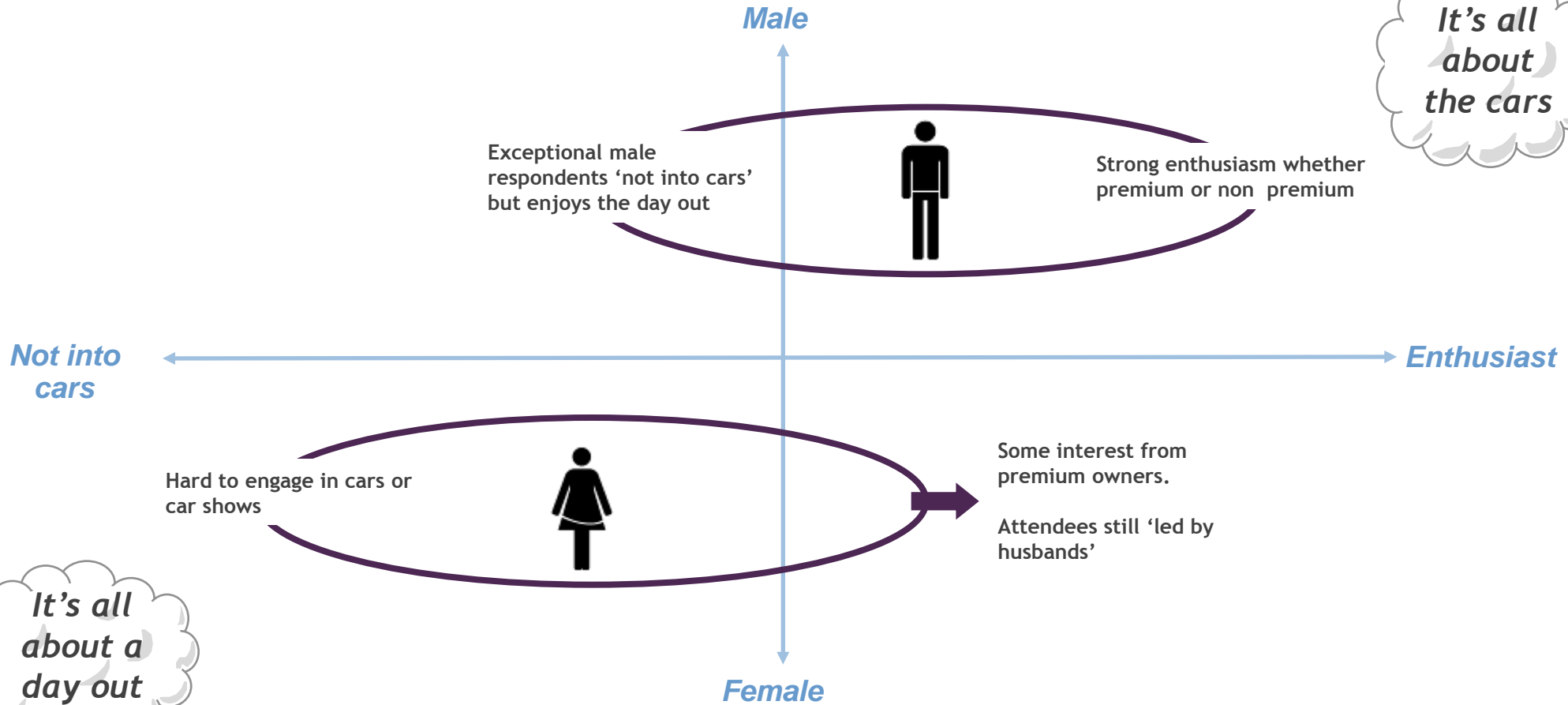
- There was a sense that there is particular opportunity for mass market brands to use such events to showcase their latest model or future direction:
 - “ *You sometimes see something that makes you think again, or challenges how you see a manufacturer you might have written off*”
 - “*It is an opportunity for them (different manufacturers) to really make you think...*”
 - However, there was some cynicism about mainstream brands showing concept cars that they never intend to develop into actual model
- Role in purchase process could be more direct if the timing of the motor show coincided with the purchase cycle:
 - It was then a more focused attempt to see the cars on the emerging shortlist

Motor shows/car events seen as particular opportunity for mass market brands to challenge preconceptions

The Ideal Motor Show



Most appealing event needs to appeal to different audiences with very different levels of engagement



Too car focused and will not engage women/car neutral but not car focused enough may lose core to Goodwood/ other events

Looking for different experiences: Is such a varied offering possible?



A day out

- Overcomes entrenched perceptions
- Feel comfortable with idea and experience
- More than just cars
- Focus on a day out, eating @ drinking
- Explicit invitation to female audience



Family fun

- Appropriate for families
- Not just father and son
- Dedicated space and activities for children
- Experiential fun
- Explicit invitation to whole family



Male bonding

- More about the cars
- Don't want it to become
- Experiential excitement
- Keen to see the best of other events like Goodwood
- Want to get close to the cars

Challenge to meet all these requirements - but it can through right balance of content

Overall Direction: A day out not sales event

Spontaneous reaction against sales event

- Across the sample, there was resistance to pushing the Motor Show too far down the sales route:
 - Real car sales driven by test drives so assumed this would mean test drive-led event
 - Test drives are stressful for many
 - Questioned practicality
 - Incompatible with ‘day out’ experience/mood
 - Test drives stressful for many (‘One is bad enough...’)
 - Hard sell environment off putting (Like visiting ‘mega dealership’!)
- Test drive event was **not the Motor Show**:
 - Narrow appeal
 - Practical ‘in purchase’/head down clientele
- There was preference for manufacturers focusing on winning hearts rather than sales:
 - However, some suggested that bridges could be built between influencing and purchasing via incentives/discounts

A sales driven event would not be the *Motor Show*

Overall Direction: A broad church that also reflects a passion for cars

Broadening appeal

- There is a need to appeal to all the family but without compromising on the passion/depth that the more car-centric valued:
 - Breadth of content:
 - New launches, classic cars, engaging/interactive content, show and theatre to **appeal to all**
 - Performance/test your skills/emerging innovation that **appeals to car-centric**
 - Tailored family content (form kids but also whole family focus)
 - More cabin based/finish/luxurious to appeal to female audience
 - However, need to ensure ‘gender neutral’ cues and atmosphere
 - Car stuff (toys/accessories) they can take home (nice to go home with something)
 - Car focused but wide ranging/inclusive of peripherals:
 - Gadgets/sat nav/new in cabin innovations
 - “The Audi has a screen that is a sat nav when viewed from the front but if viewed from the back it is DVD”

But retaining its passionate core.

Ideal motor show component parts - involvement and interaction - getting closer to cars



Getting in/turning engine on/ driving?

Go to dream - being inspired and excited



Concept cars, classic cars, performance cars, never buy one but fuels the passion.

Fun for family - dedicated activities and areas for kids



Kids only content and things whole family can enjoy together.

Passionate people not sales people - who are interested in the car and not the sale



Preference for engaging with enthusiasts/advocates not sales people but brochures to take home and browse

A break from cars - and improving expectations of the dining experience



Car focused but with range of eating/socialising opportunities.

In doors & out doors is the optimum combination



Reduce cabin fever/provide excitement/feeling of cars in motion.

Seeing, hearing and feeling motion



All the senses need to be stimulated.

Expected Green motoring inclusion but needs to challenge entrenched perceptions about performance to earn place on 'must see' list



This underpins the need to see and feel the cars perform so they *demonstrate* their ability.

Summary and conclusions



Summary and conclusions: Motor Show needs to change and communicate it has changed

Motor Show needs to communicate it has changed

- Cultural/societal/industry changes have influenced expectations about a car events:
 - Greater expectations for involvement activity and ‘experience’ in any day out
 - Greater expectations/demands for family content
 - People accustomed to more contemporary approach to cars (Top Gear, Goodwood)
 - Even the dealership experience is changing (for the better)
 - Cars less individual/less British than in previous times
- Attendees know the Motor Show has already moved to reflect these changes but for others traditional associations remain and can act as barriers
- Any future event needs to reach out to women to actively demonstrate their inclusion:
 - Currently not their radar
 - Lessen resistance when suggested by husband/even encourage women to suggest as treat for men they would enjoy?

Explicit invitations to less receptive audiences.

Broadening appeal

- Different audiences want different experiences but these are not incompatible
- There is considerable and broad appeal in the idea of a revamped Motor Show:
 - A day out (for car lovers but also the whole family)
 - A broad range of cars and car related content reflecting differing degrees of interest and perspectives
 - Interactive on different levels - in terms of access to cars but also participatory events (fun and skill testing/ competitive/kids events)
 - 'Live' and living event, engaging all of the senses
 - Green or environmental aspect had less popular appeal but acknowledged as having important role to play - absence may be more statement than inclusion?
- However, there is desire to retain/regain some of the excitement and 'buzz' of previous years:
 - Celebrity events (Jay Kay rather than scantily clad models draped over bonnets)
 - Launches (cars and new technology)
 - Global in content/reach but also British?
- There seems to be a preference for revamped Motor Show with heritage rather than complete new type of show

Summary and conclusions: Preference for Day Out rather than sales event

Connection with sales is indirect

- Currently the Motor Show plays an influencer role rather than having specific part to play in decision process.
 - There is particular role for mainstream manufacturers to use the event to challenge preconceptions
 - The ROI of this sort of brand communication is hard to quantify for manufacturers
 - Attendees especially, feel that the event feels a little flat if major brands do not put in a an appearance - and some feel that this is a slight on the British market:
 - “If they can’t be bothered to show up then that says it all”
- There is resistance to an overt sales focus in future events as these will significantly change the nature and feel of the day out:
 - Any serious sale event will need to rely on test drives (as purchases rely upon these)
 - Want to interact with enthusiasts/experts not sales people
 - Some suggested that a compromise could involve linking the influencer event to the purchase:
 - Offering attendees future discounts/incentives?

Test drive central to purchase.

Quantitative questions areas

Profile

Demographics; age, gender, income
Attitudes to cars; passionate/enthusiastic
through to functional/practical

Attitudes to existing motor shows

Motor Shows and other similar events attended
recently
Perceptions of motor shows in general and the
British Motor Show in particular

Potential 'new' motor show

Appeal of possible components of a new 'British
Motor Show'; family entertainment, classic cars,
new launches, car gadgets, interactive
activities, celebrities, test drives, etc.

Practical expectations

Price; single ticket, family ticket, 2 day pass,
etc.
Location; distance prepared to travel
Venue; indoor Vs outdoor, city centre Vs out of
town

Purchase process

Sources of information used when buying a new
car (role of the motor show)
Components of the purchase process (role of
motor show)

Concept appeal

Relative appeal of potential 'motor show'
concepts; family day out,
(if these can be developed)