



Jigsaw Research

Developing the UK Car Show SMMT & the UK car industry

July 2010

The agenda

- Objectives and Approach
- Sample Profile
- Summary
- Cars and car buying
 - Motor shows
 - The Perfect Motorshow day out
- Reactions to the Concepts
- Conclusions

Objectives and Approach

Sample Profile

Objectives and Approach

Objectives

- To assess the relative appeal and likelihood to attend a selection of motor show/event concepts
- To ask 'in market' car buyers to design their 'perfect motor show day out'
- To estimate the acceptable 'per head' price range for a day ticket to a motor show/event
- To assess how far people were willing to travel to attend a motor show as well as what their preferred venue would be

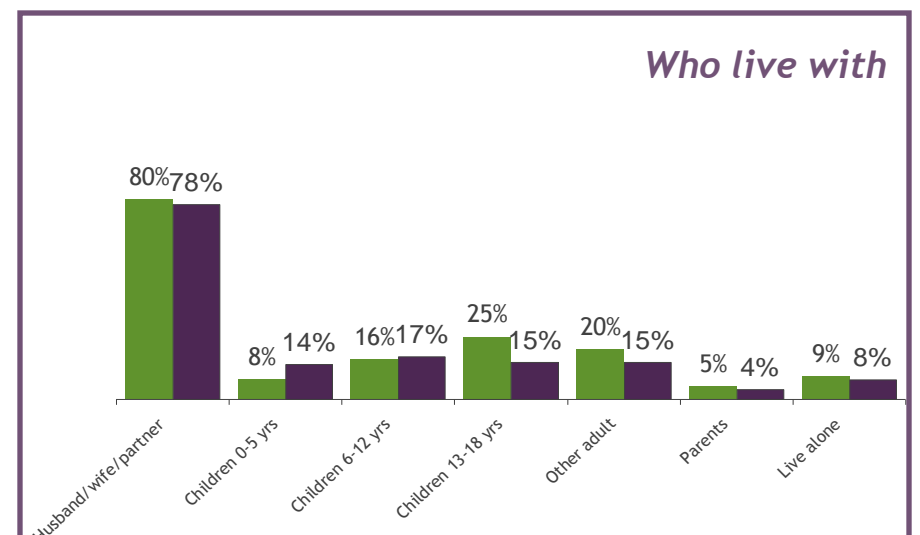
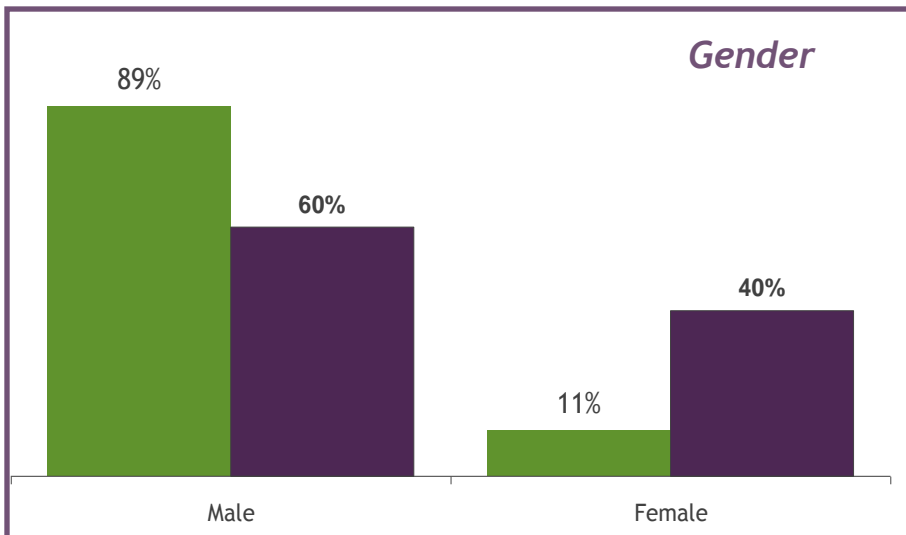
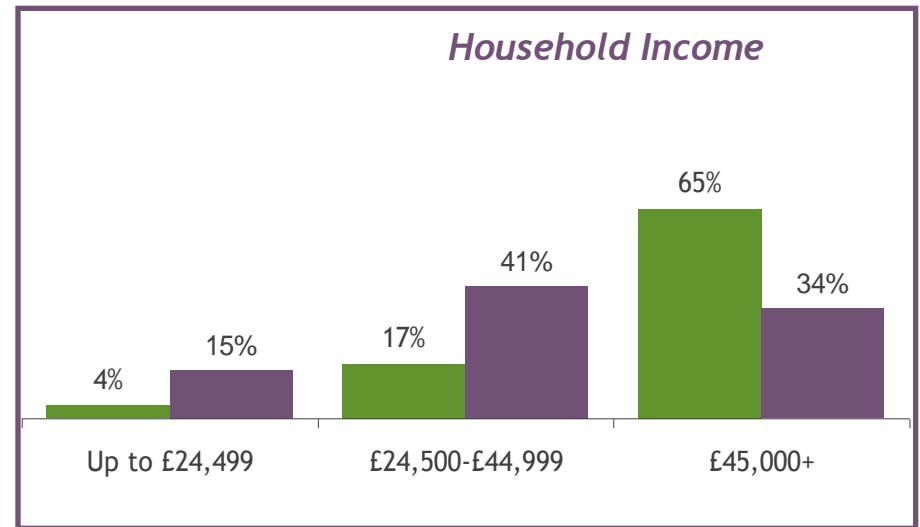
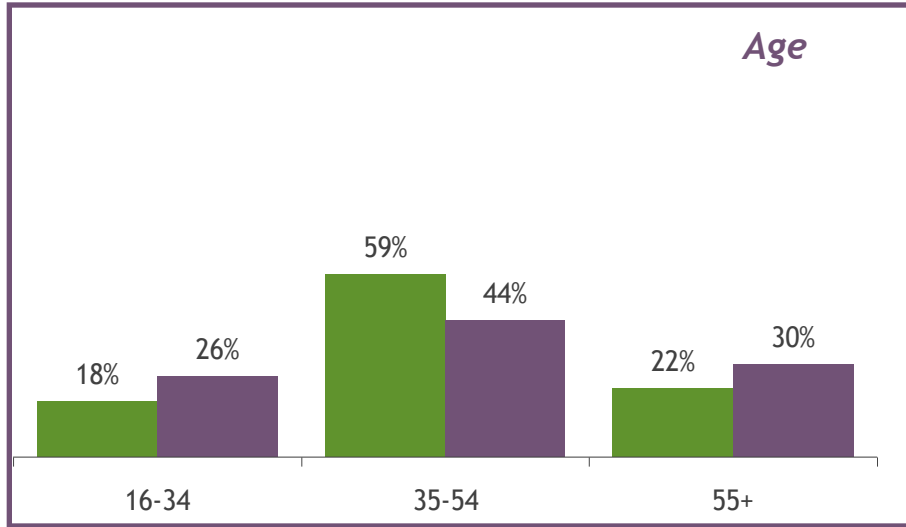
Approach

- Online survey undertaken; fieldwork dates were 25th June to 11th July:
 - 250 interviews with previous motor show attendees; sample provided by SMMT
 - 250 interviews with people who had not previously attended a motor show; recruited from an online panel; those who completely rejected the idea of attending a motor show were screened out
 - All those surveyed were 'in market'; likely to change their car in the next 18 months

Profile

Attendees are more likely to be younger, affluent and male

Attendees
Non Attendees



Summary

The Attendees were enthusiastic about cars and about motor shows/events. They were younger and much more affluent than the Non Attendee sample; they were predominantly male. They changed their car frequently and had a relatively high budget available for their next purchase. They were willing to travel further and pay a higher entrance fee to attend a motor show than the non Attendee sample.

It seems therefore that those who attend motor shows are a prime segment of the car buying public for the car industry to target

When designing their 'perfect motor show' day out Attendees prioritised the features relating to exploring and evaluating their next new car purchase; furthermore, the majority stated they would be likely/very likely to attend the 'one stop shop' motor show concept; 58% rating it as their 1st or 2nd most appealing idea. Thus it seems there is an opportunity to design an event with the express purpose of informing potential buyers of the features and benefits of the various brands and models available in the market.

Attendees were also enthusiastic about many of the other core 'car related' features presented to them to choose from; concept cars, super cars, classic cars, interactive car events, stunts, precision driving, etc. This aligns with the high appeal of the 'best of British and world motoring' concept; the second most likely to be attended by this audience and rated 1st or 2nd most appealing idea by 61%

Very few of the non Attendees described themselves as enthusiastic about cars but the majority had a least some interest. They changed their car less frequently and had a lower budget for their next purchase than the Attendees, but were almost as likely to consider a new car and to consider several makes as the Attendees

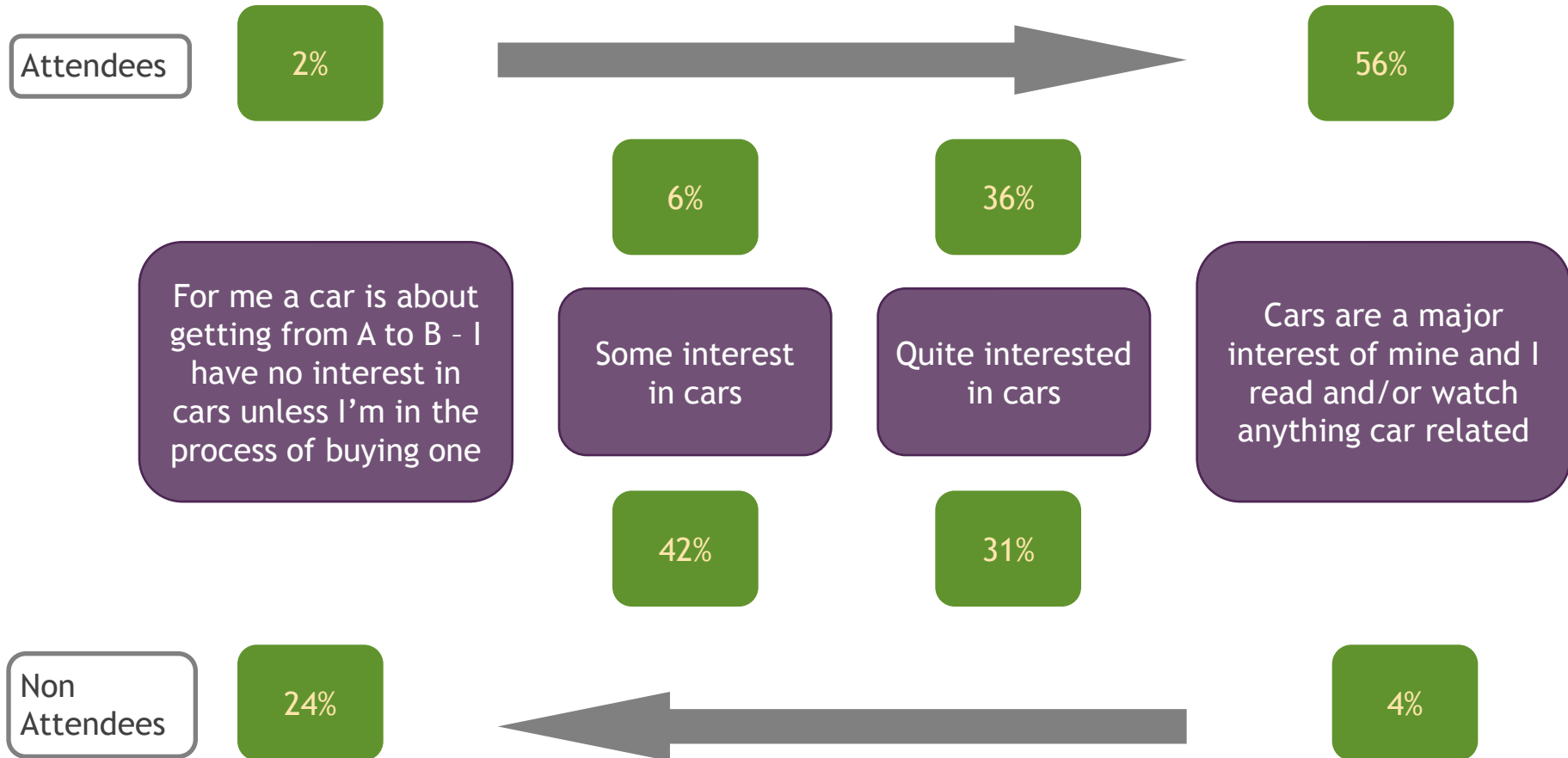
Attracting them to attend a motor show/event could prove a challenge as the majority were unwilling to travel more than an hour or two to attend and only 29% described themselves as likely/very likely to attend a motor show/event in the future. Key barriers to previous attendance were ‘not being sufficiently interested in cars’ and ‘not enough to keep the children interested’; non Attendees were more enthusiastic about the ‘fun activities for all the family’ and ‘things to do for those less interested in cars’; thus it seems that stressing the all round appeal of a motor show/event will be key in attracting this audience to any future events.

When designing their ‘perfect motor show’ day out and also in their selection of the most appealing concepts, non Attendees prioritised very much the same features as the Attendees; the ‘one stop shop’ idea and the ‘best of British and world motoring’ being the most appealing ideas overall. Thus it seems that an event could be designed that would appeal both to current motor show and car enthusiasts and to those with less interest in cars. It would be important to design it with some elements of wider appeal and marketing would need to be tailored to the different target audiences.

Cars and car buying

Are motor show attendees a prime sector of the car buying public?

The majority of Attendees are enthusiastic about cars, markedly more so than the Non Attendees

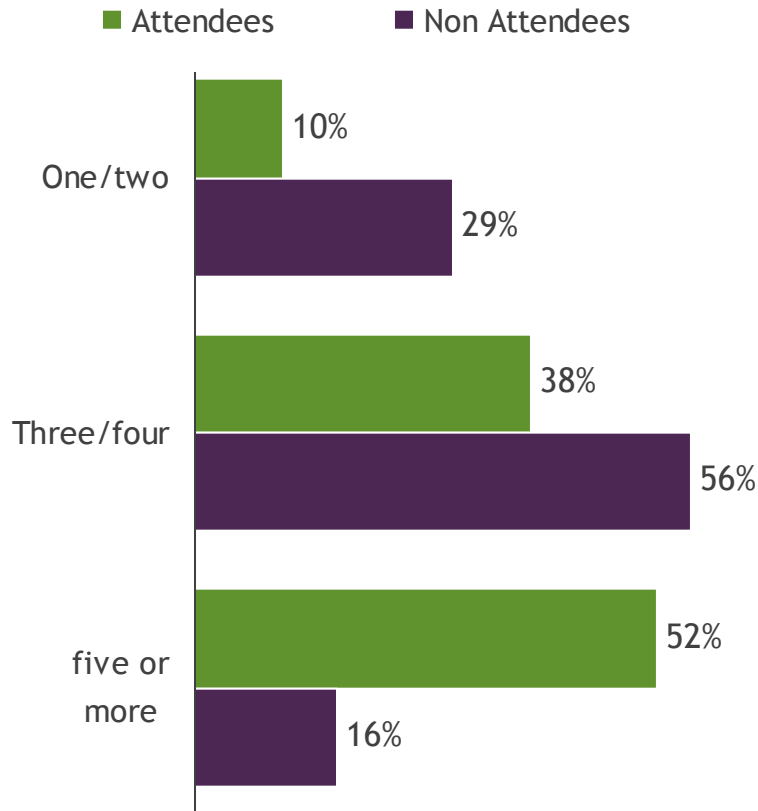


Are motor show attendees a prime sector of the car buying public?

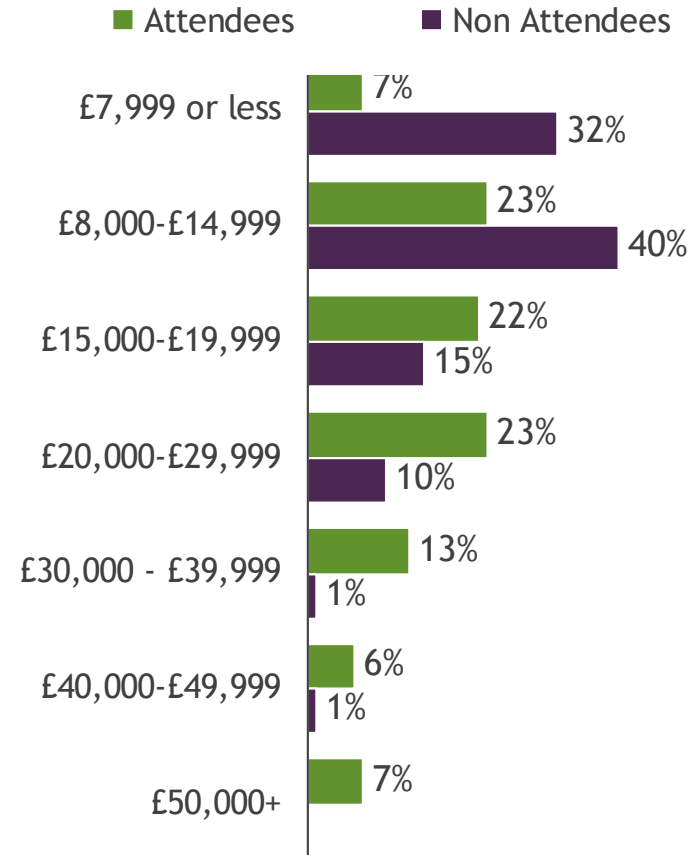
Attendees change their car more frequently and have a much bigger budget to spend

Q2b roughly how much do you think you'll spend on your new car/what budget will you have for your new company car?
Q12a How many cars have you owned (including company cars) in the last 10 years?

Number of cars owned in past 10 years



Budget available for next car

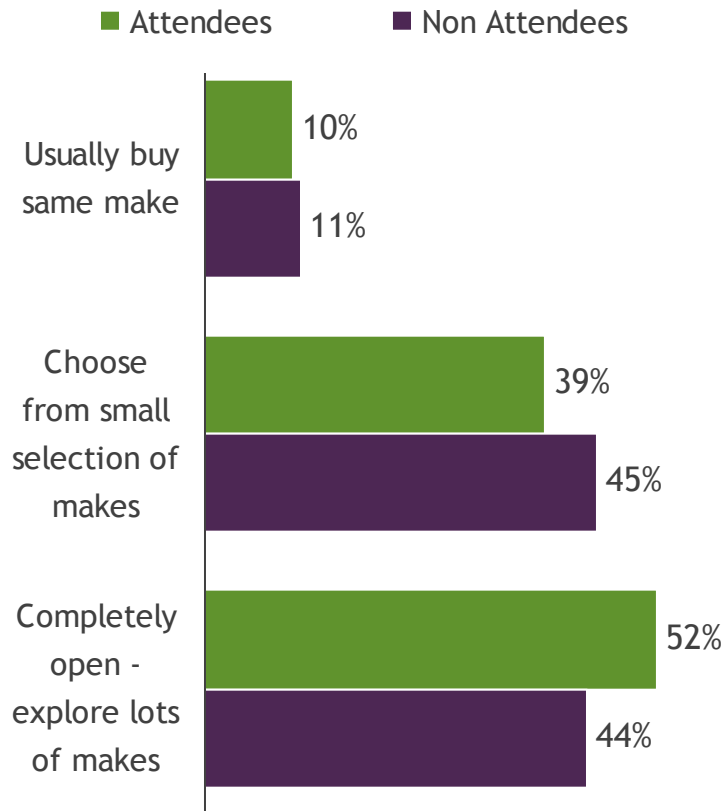


Are motor show attendees a prime sector of the car buying public?

The majority do consider at least a small number of makes when choosing a new car and consideration of new cars is high; Attendees cite Motorshows as a source of information when deciding what car to buy

Q2c And will you consider a new car if you replace your car in the next 18 months?
Q12d When you buy a new car, which of these phrases best describes how you approach it?

Approach when buying a new car



78% of Attendees and 64% of Non Attendees are the primary decision maker when deciding what car to buy

74% of Attendees and 83% of Non Attendees would consider a new car for their next purchase

77% of Attendees but only 6% of Non Attendees cite car events as source of information when deciding what car to buy. 31% of Attendees cite car events as one of their most important sources

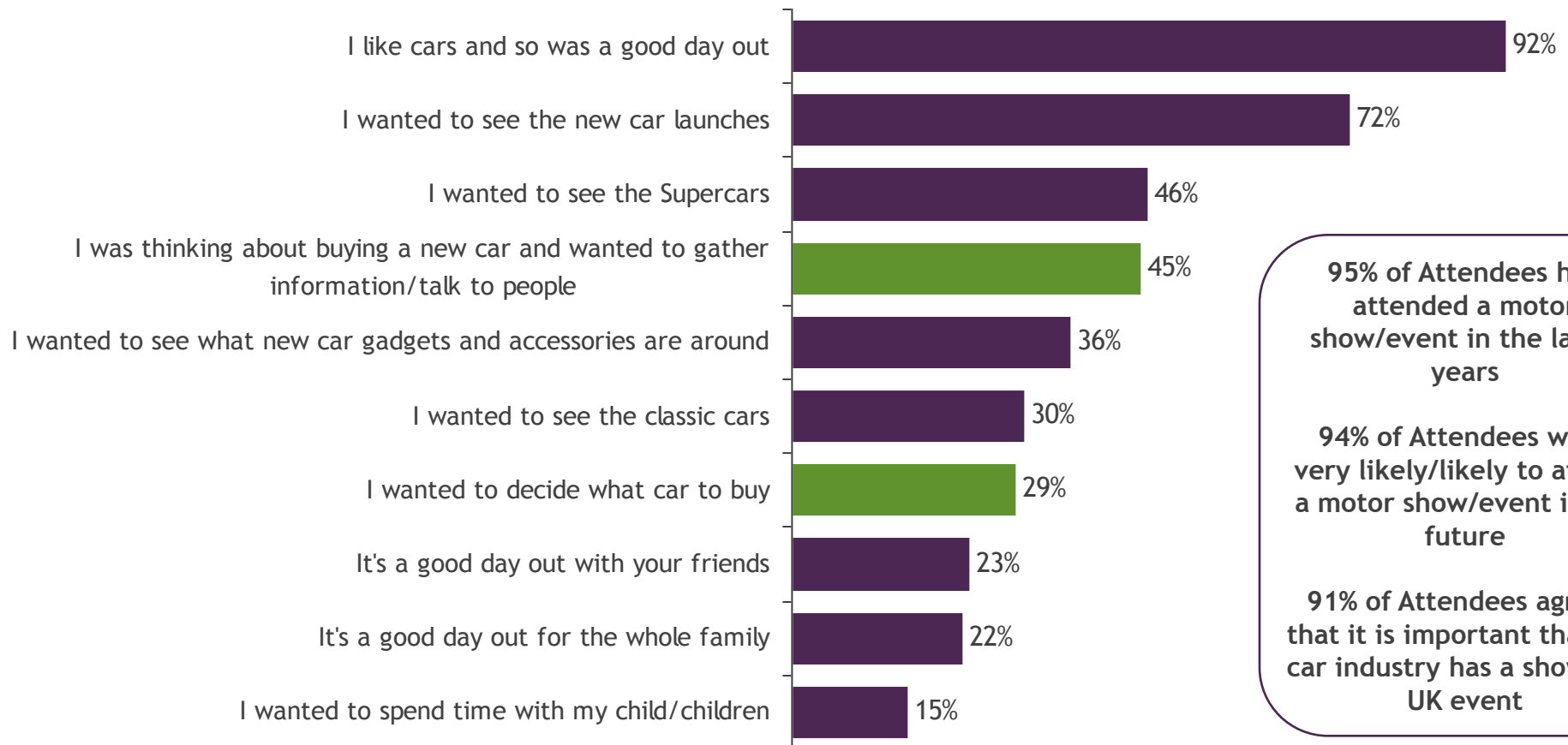
Motorshows

Attendees like motorshows mainly because it's a good day out for the car lover and they want to see what's new

For a proportion of attendees researching a future purchase was part of the appeal of the motorshow

Q4 Which of the were your main reasons for attending the last motor show you went to?

Reasons for attending motorshows



95% of Attendees had attended a motor show/event in the last 2 years

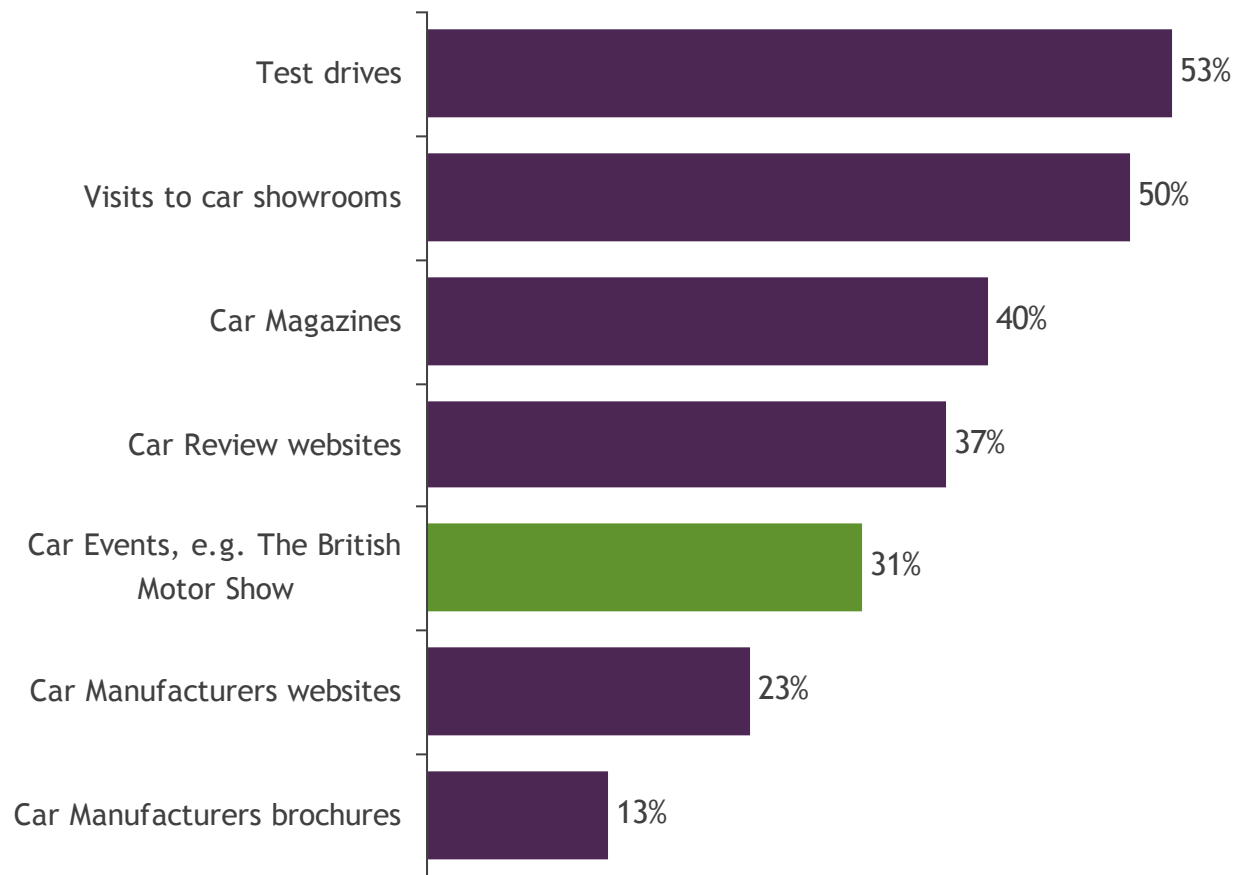
94% of Attendees were very likely/likely to attend a motor show/event in the future

91% of Attendees agreed that it is important that the car industry has a showcase UK event

One third of Motor show attendees see motor shows as a one of their most important sources of information when deciding what car to buy *(and 77% cite them as one of their sources of information)*

Q13b And of these sources, which are the most important to you?

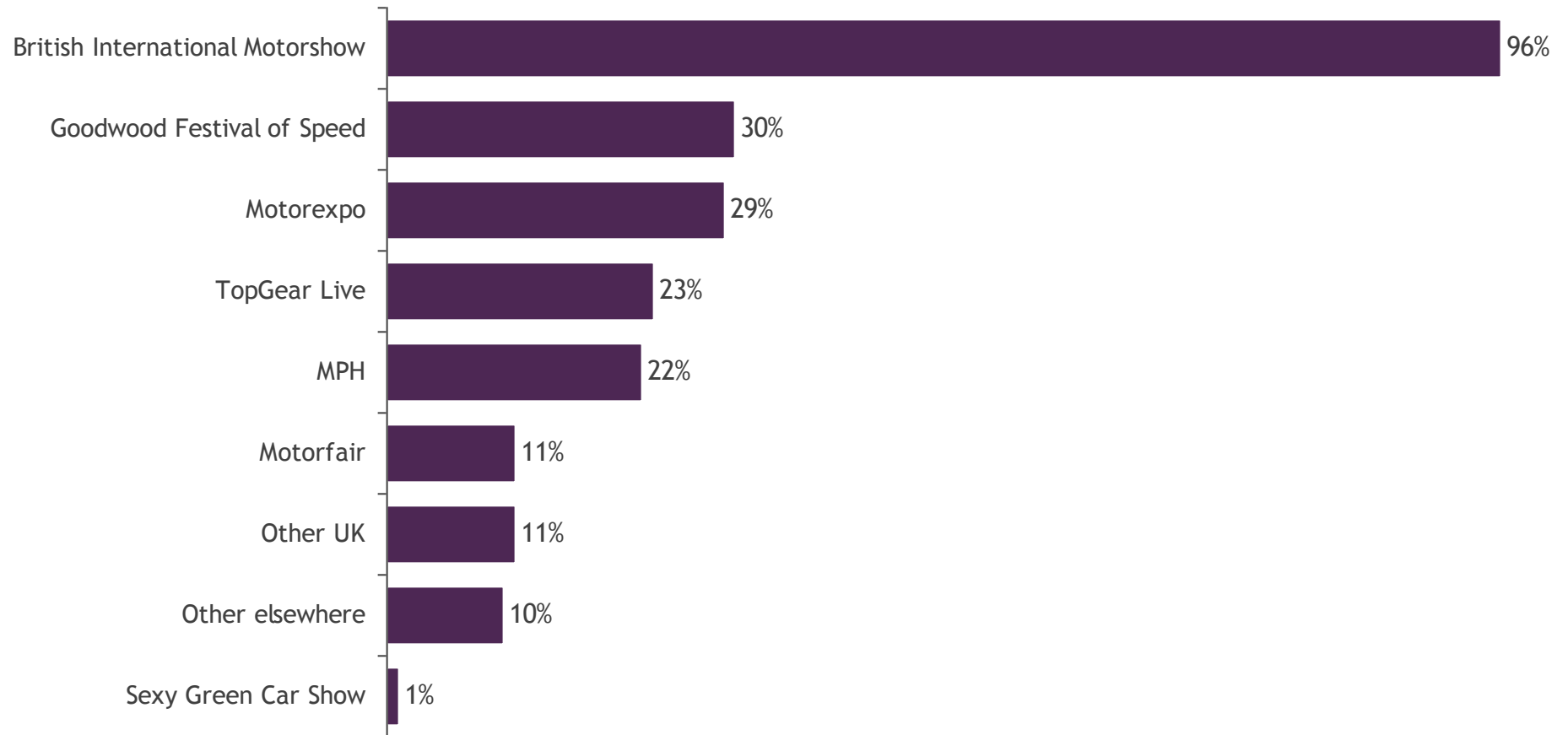
Most important sources of information when buying a new car



Attendees had attended a range of other motor shows/events

Q3d Which motor shows/events have you visited?

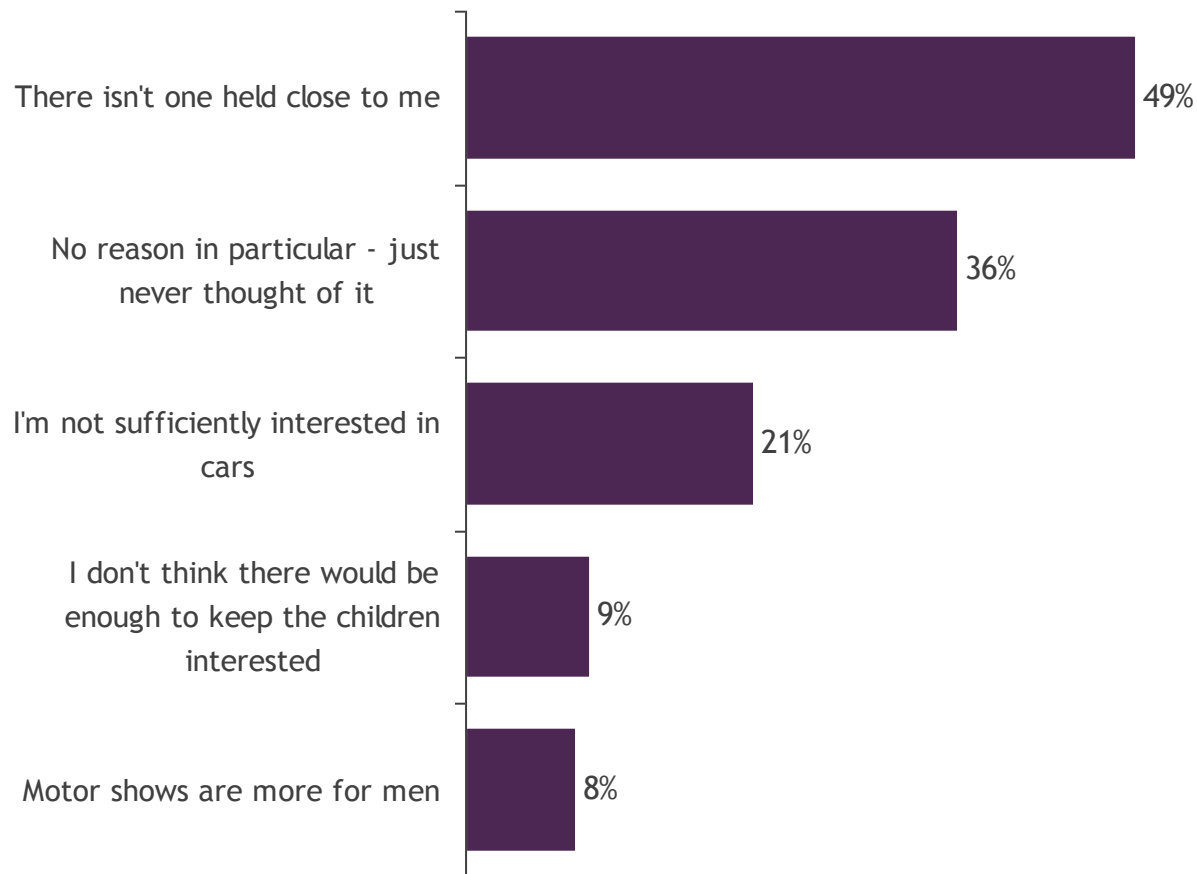
Motorshows attended



Non Attendees are less willing to travel to a motor show/event than attendees and have doubts about how interesting they would find a motor show/event

Q3c Can you say why you have never attended a live motor/show event in the UK?

Reasons for not attending motorshows



80% of Attendees appear at least somewhat open to the idea of attending a motor show/event in the future

49% of Non Attendees agree that it is important that the car industry has a showcase UK event

The Ideal Motorshow

The Perfect Motor Show Day Out

When designing their perfect motor show attendees and non attendees were very consistent in their choices; it seems that a 'one stop shop' for exploring and evaluating their next purchase options would be a popular event

Q5 If you were designing the 'perfect motor show' day out, how important would each of these components be to you personally?

Attendees

Non Attendees

% scoring 8-10

Rank

Rank

% scoring 8-10

91	1	Being able to see the latest models from the major manufacturers	1	71
90	2	Being able to sit in the cars being displayed	2	70
88	3	See the range of all the manufacturers	3	62
66	4	Being able to research your next car purchase	4	60
59	5	Being able to talk to people from the major manufacturers	7	49
53	6	Latest concept cars on display	10	37
50	7	Draw up a shortlist of makes and models for my next car purchase	8	47
48	9	Being able to test drive the latest models from the major manufacturers	5	54
44	10	Being able to see and hear the cars in action	6	52

The Perfect Motor Show Day Out

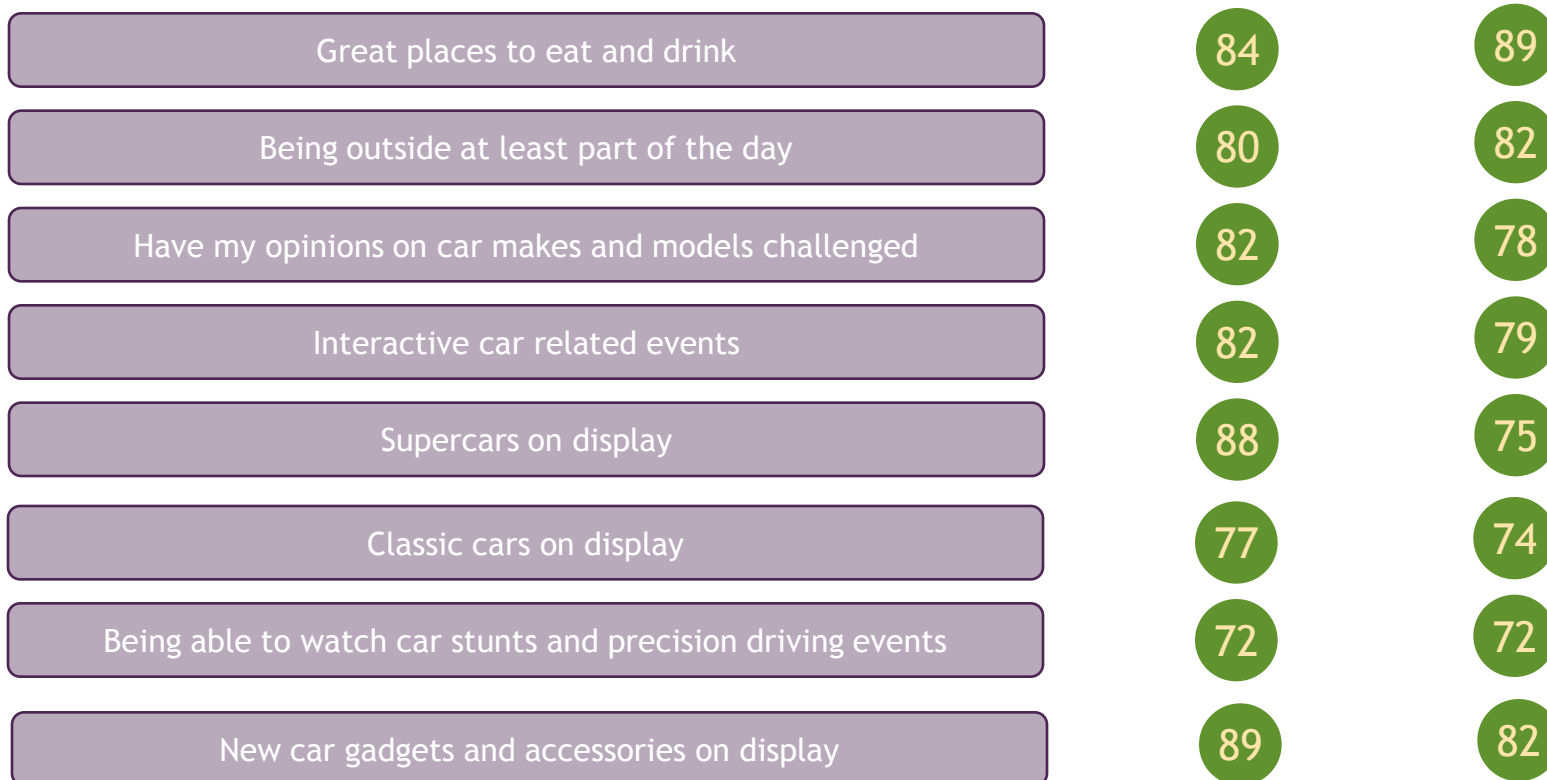
There were other features that had high levels of appeal for both attendees and non attendees, plus non attendees were interested activities with wider appeal

Q5 If you were designing the 'perfect motor show' day out, how important would each of these components be to you personally?

% Appealing/Very appealing/Essential

Attendees

Non Attendees

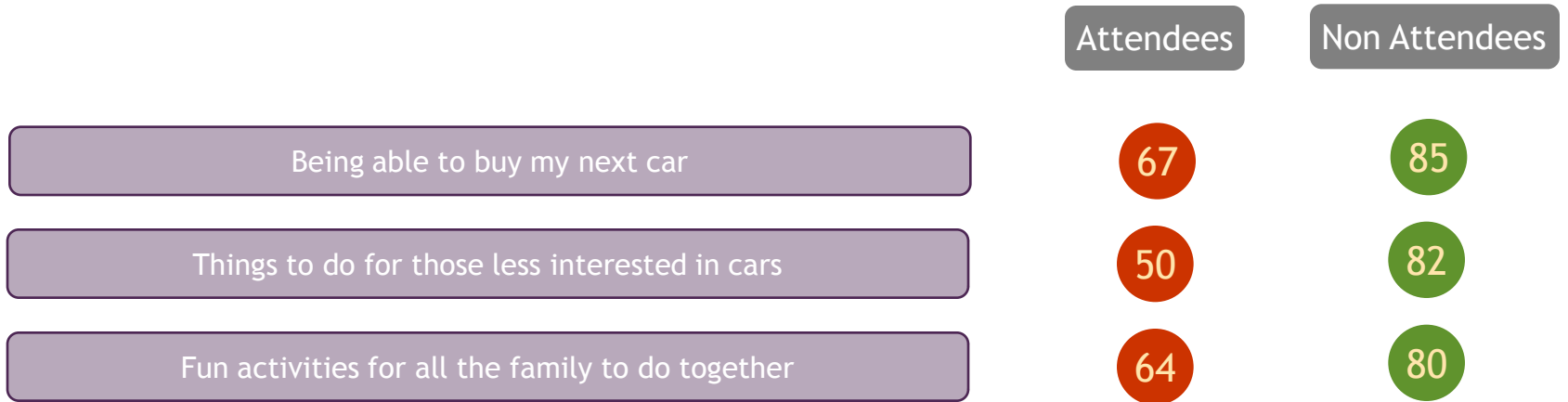


The Perfect Motor Show Day Out

Non attendees were interested activities with wider appeal, plus would welcome the opportunity to be able to buy there and then

Q5 If you were designing the 'perfect motor show' day out, how important would each of these components be to you personally?

% Appealing/Very appealing/Essential

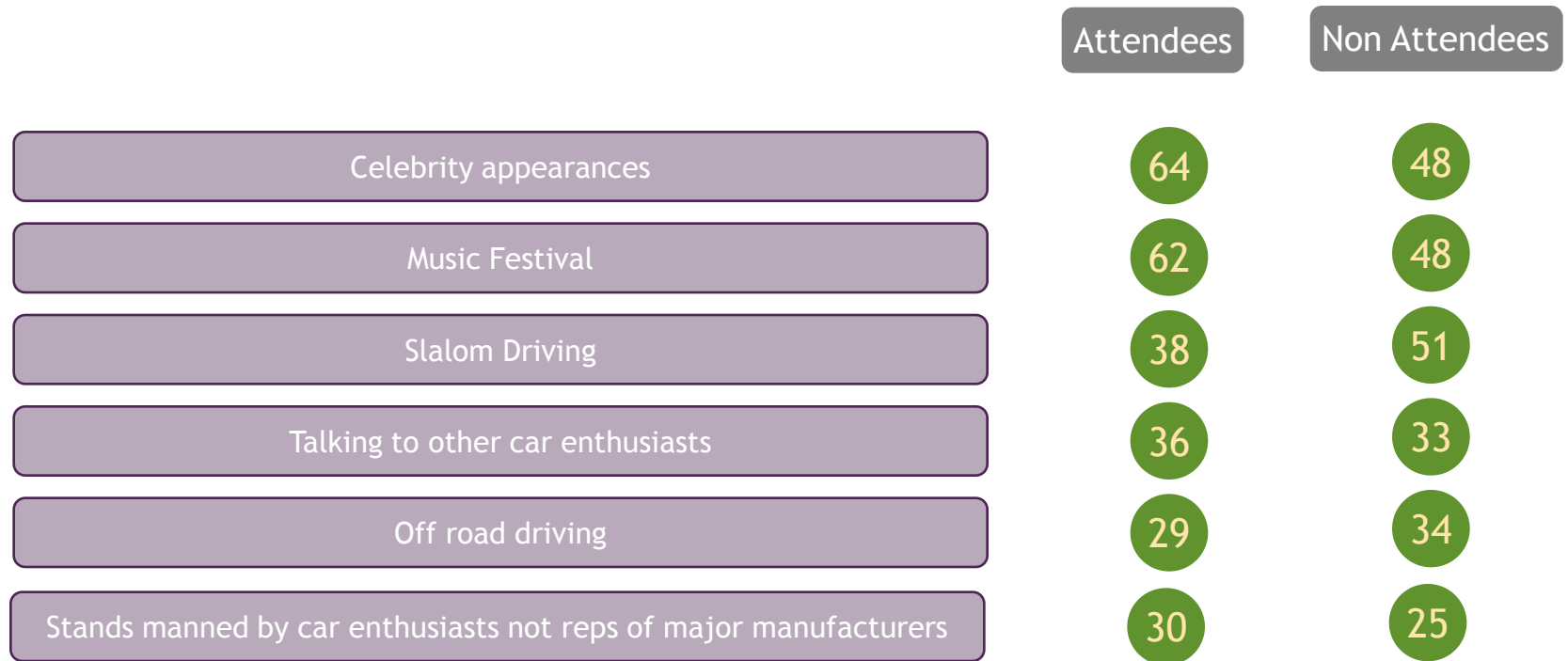


The Perfect Motor Show Day Out

There were several potential components that many attendees and non attendees felt were irrelevant (and few found very appealing/essential)

Q5 If you were designing the 'perfect motor show' day out, how important would each of these components be to you personally?

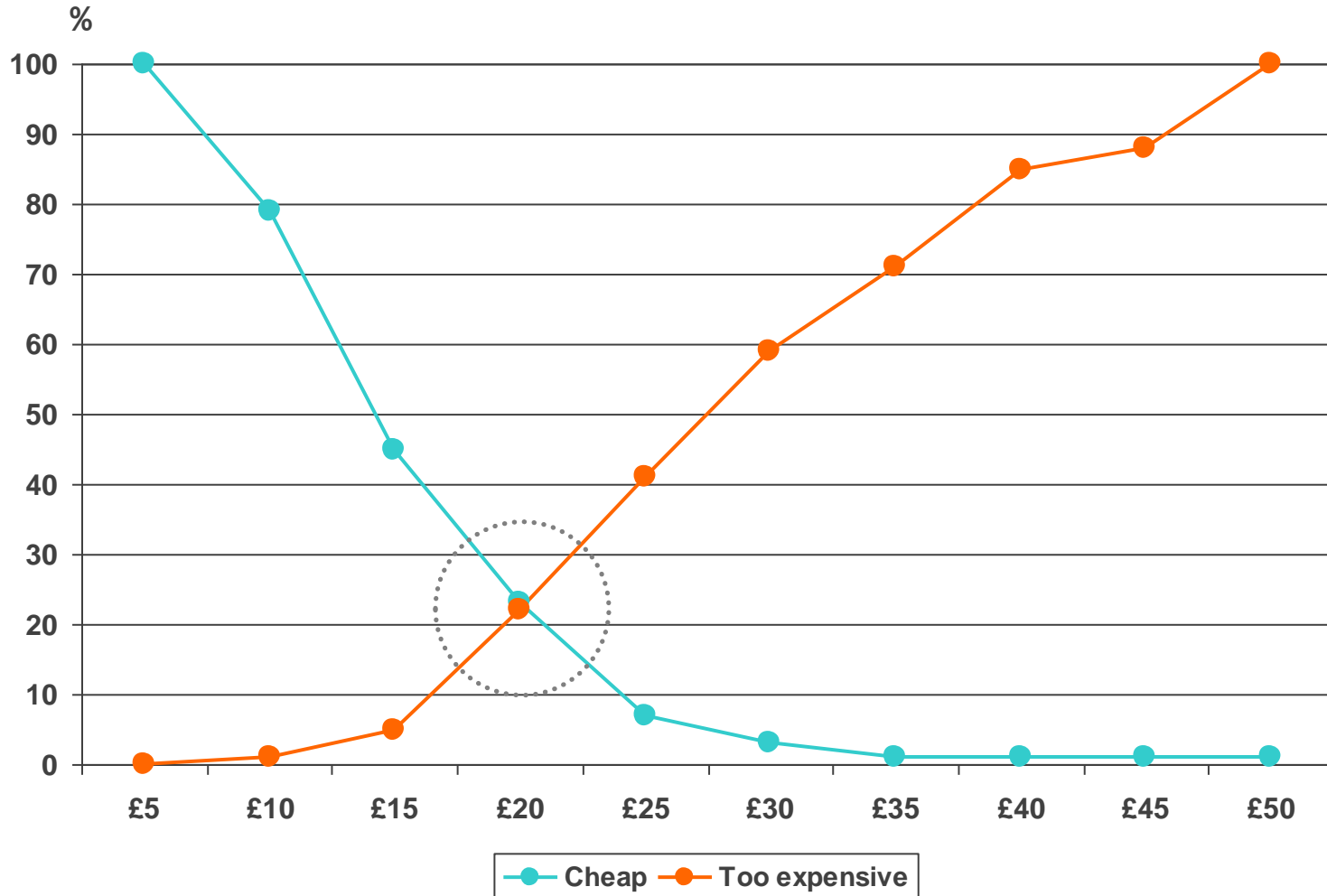
% Unappealing/irrelevant



Optimum Price

A price per head of around £20 seems about right for the Attendees; at this point roughly equal numbers feel it is cheap as feel it is too expensive

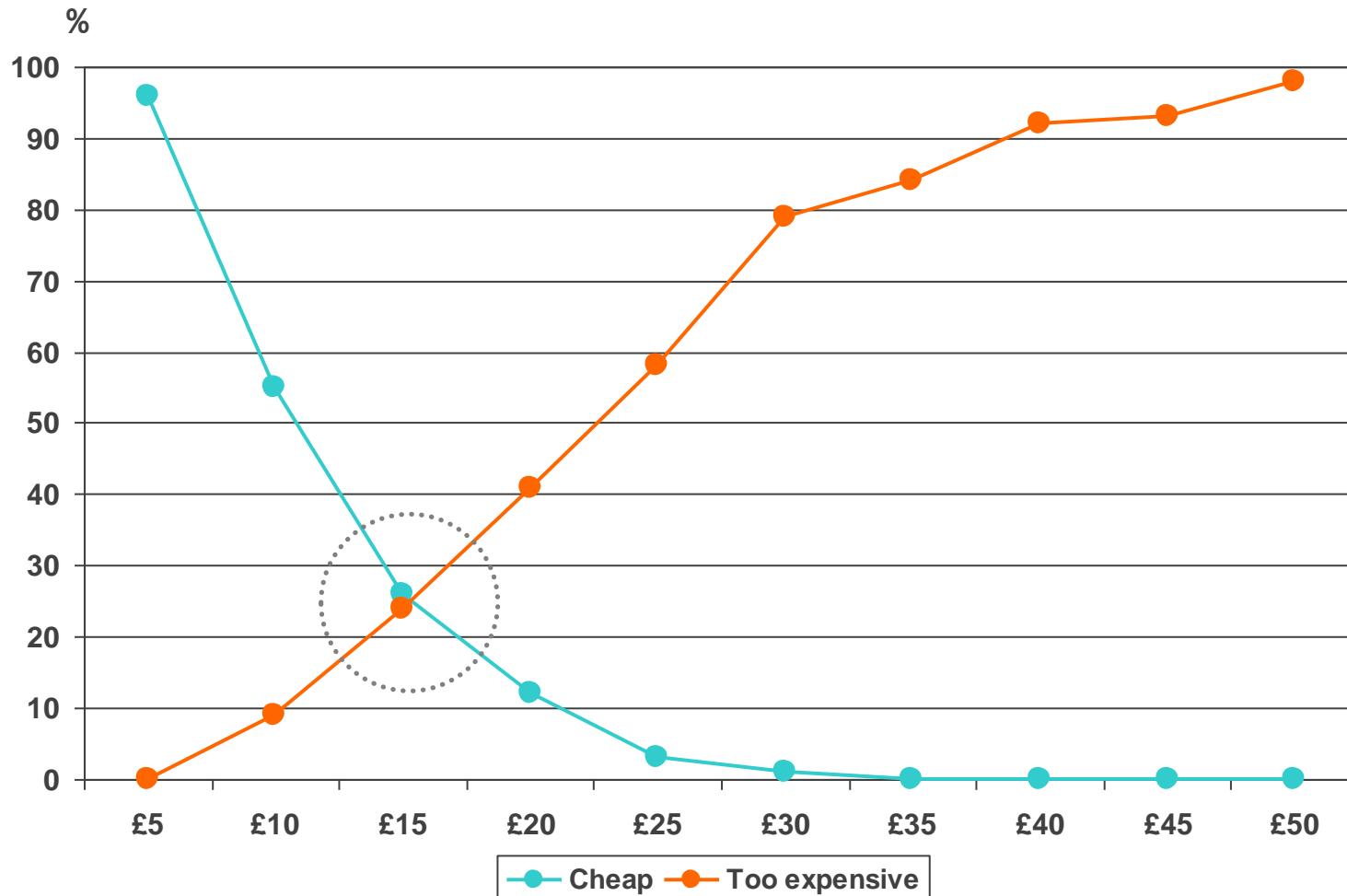
Q9a At which of the following prices would you think the price per person per day for a day ticket to a motor show/event was cheap?
Q9b At which of the following prices would you think the price per person per day for a day ticket to a motor show/event was too expensive?



Optimum Price

A price per head of around £15 seems about right for the Non Attendees; at this point roughly equal numbers feel it is cheap as feel it is too expensive

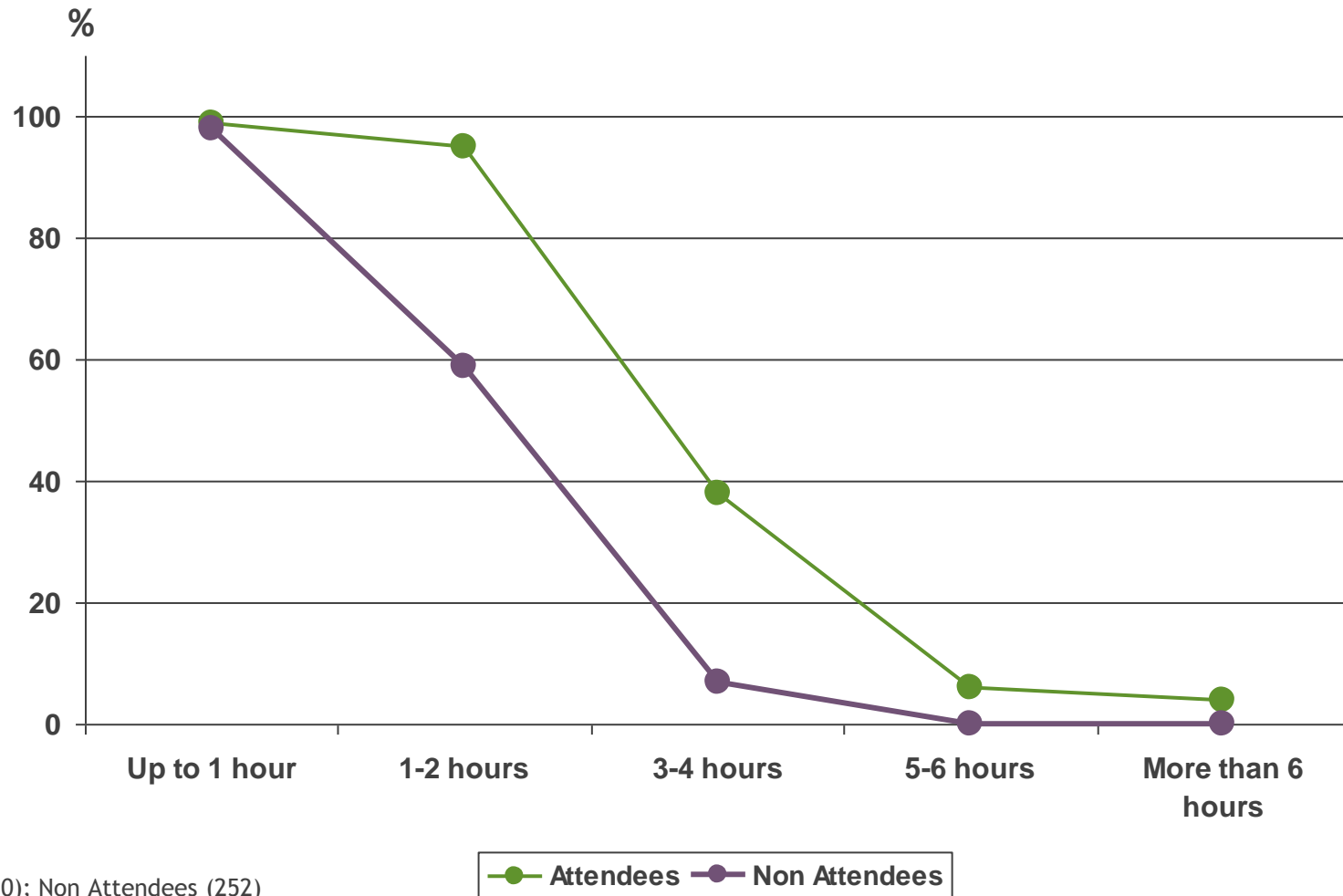
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Distance willing to travel

Attendees are willing to travel for longer to attend a motor show/event; up to 2 hours is ok for many, although a good proportion of attendees are willing to travel for longer for this

Q8 How far would you be willing to travel to attend a motor show/event?

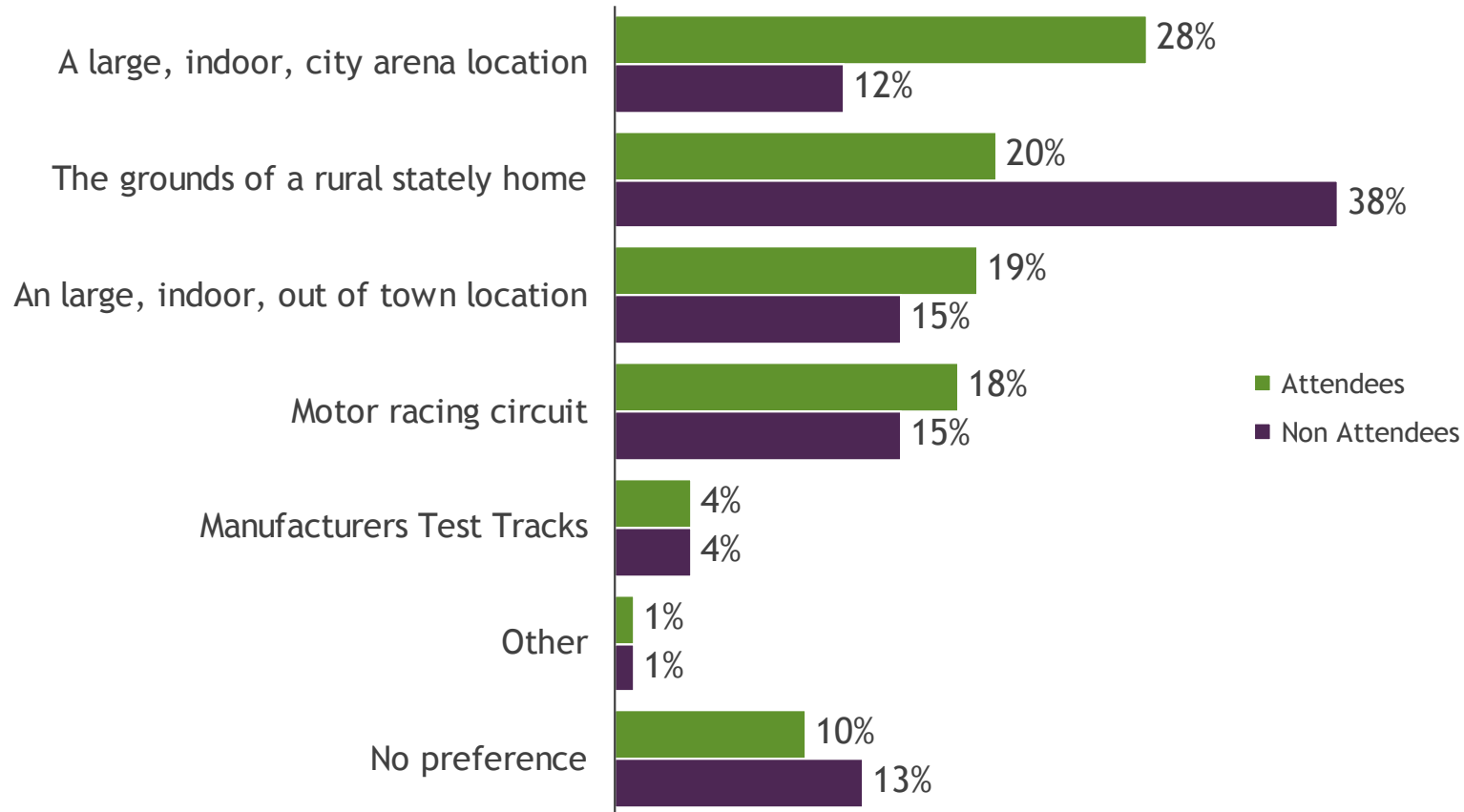


Most appealing venue

Attendees express a range of preferences, however non attendees favour the grounds of a stately home, again reflecting their desire for a day out with broader appeal

Q10 Which of the following venues are most appealing to you personally for a motor show/event?

Most appealing venues



Appeal of the Concepts

Overall, the most appealing concepts across both audiences are

Because the only way to really choose a car is to drive it, an event has been designed that will allow potential car purchasers a chance to test drive a shortlist of cars - all on one day, at one convenient location. All the major manufacturers and models will be available but in a low pressure, non dealership environment.

A chance for the whole family to experience the best of British and world motoring. Classic cars, concept cars, performance cars, new launches and the latest models from major manufacturers all in one convenient central location. Displays, exhibitions, celebrity appearances, shows and fun interactive events with great places to eat and drink.

An event that celebrates motor sport and all things automotive in a picturesque countryside location. The Wimbledon of motoring events, with a myriad of sports cars which can be seen and heard driven in anger plus stars and motor sport royalty...an exuberant display of style, sound, smell and colour.

This event offers a fun, engaging and unpredictable day of non-stop car action, trials and stunts. Amongst other things see of world's best precision drivers, the world's first indoor loop-the-loop and other surprise features - all not to mention the ringmasters themselves; celebrity hosts at the head of the motoring mayhem.

This event is dedicated to green motoring - the latest breakthroughs, the newest models, the latest technology from around the world, including the major manufacturers. The event will demonstrate that it is possible to buy responsibly without compromising on performance or budget. The event will be a fun and interactive day out for all the family

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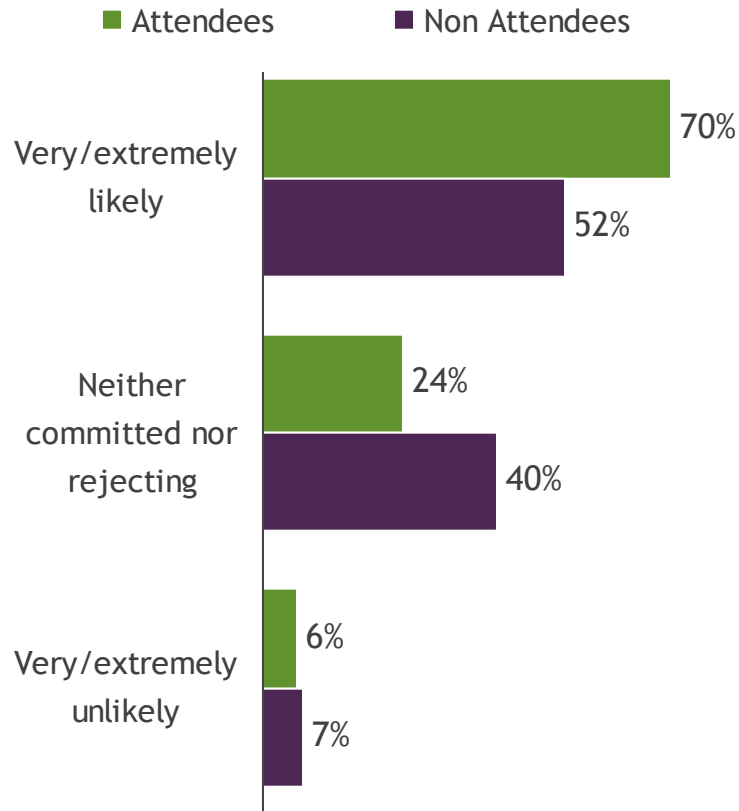
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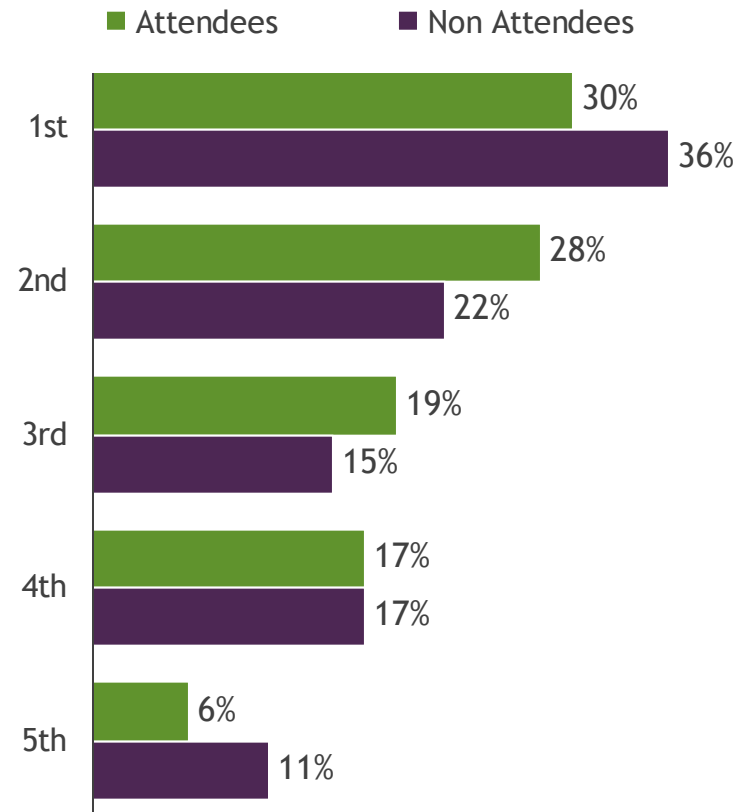
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Q6 Can you say how likely you personally would be to attend each one, on a scale of 1 to 10 where 1 is extremely likely and 10 is extremely unlikely?
 Q7a Can you rank them in order of appeal to you personally, where 1 is the most appealing, 2 the second most appealing, etc?

Likelihood of attending



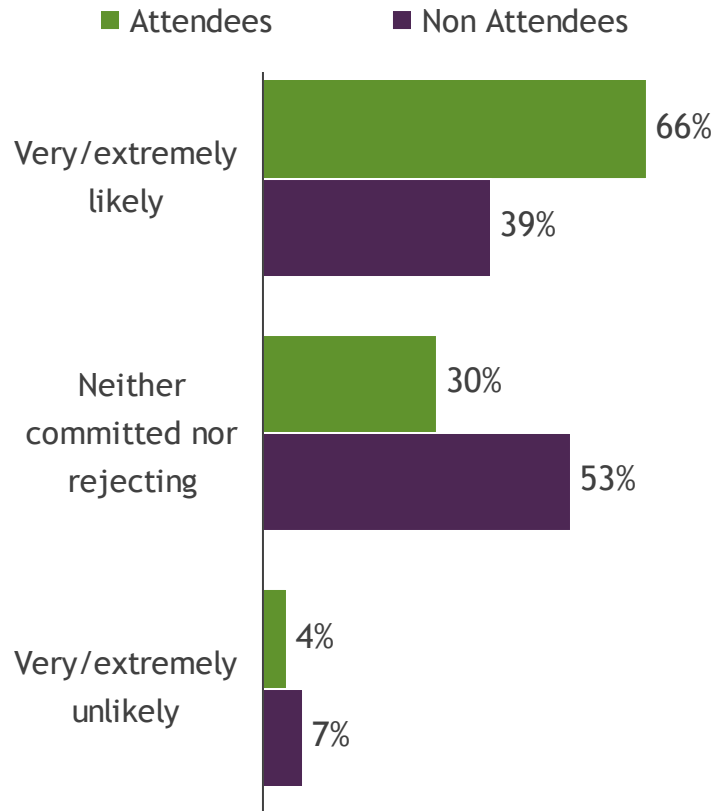
Rank order of appeal



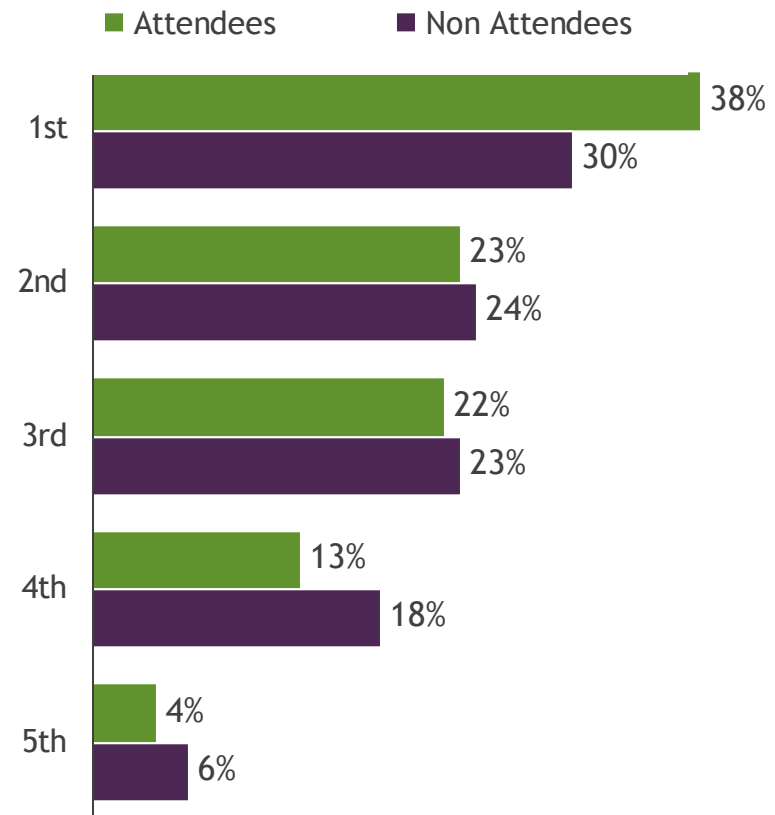
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Likelihood of attending



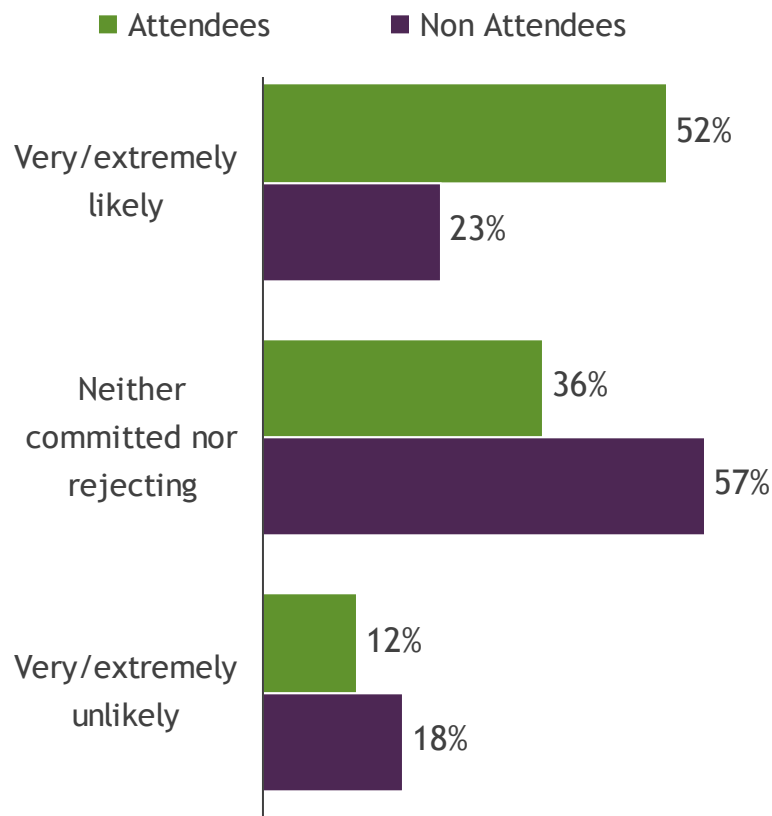
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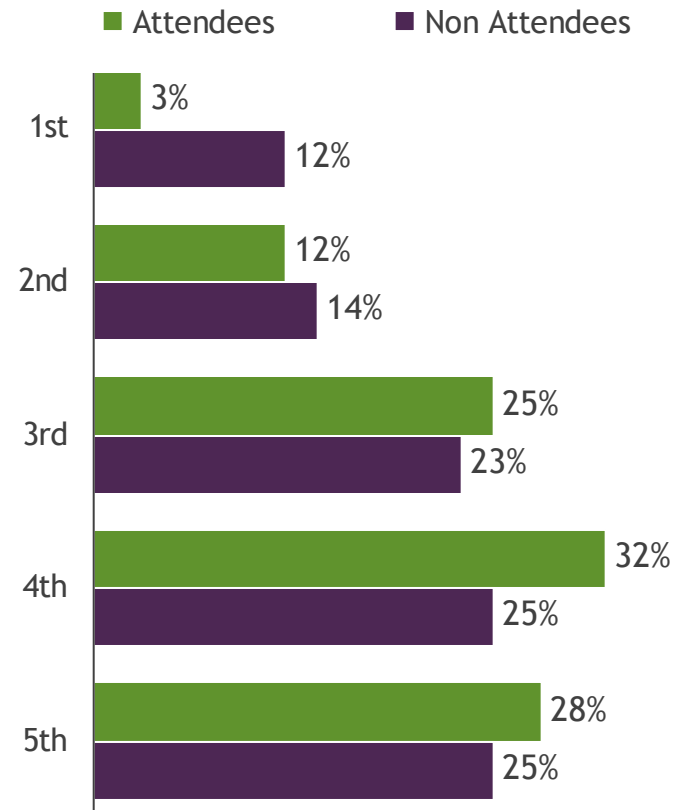
An event that celebrates motor sport and all things automotive in a picturesque countryside location. The Wimbledon of motoring events, with a myriad of sports cars which can be seen and heard driven in anger plus stars and motor sport royalty...an exuberant display of style, sound, smell and colour.

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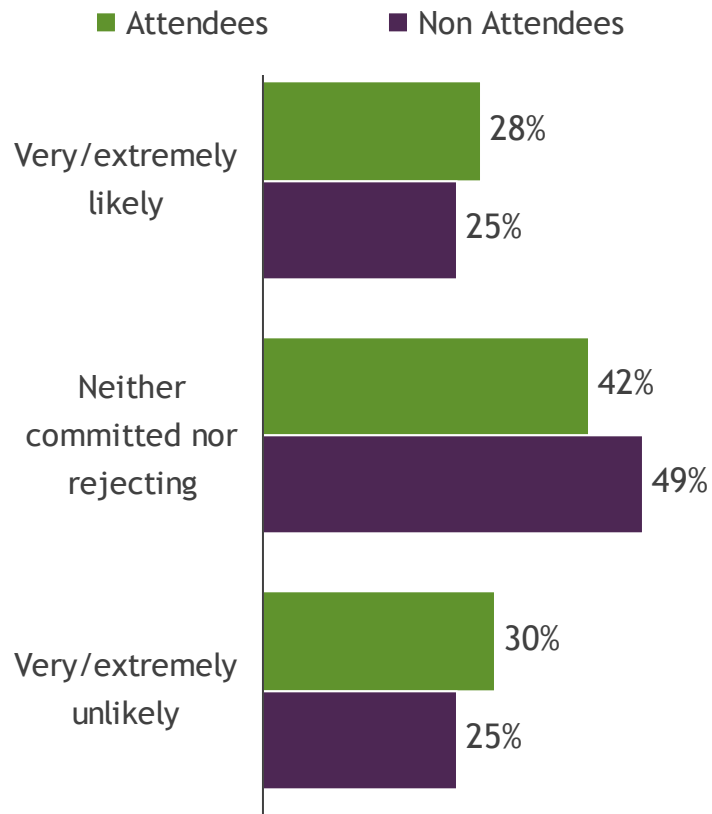
Rank order of appeal



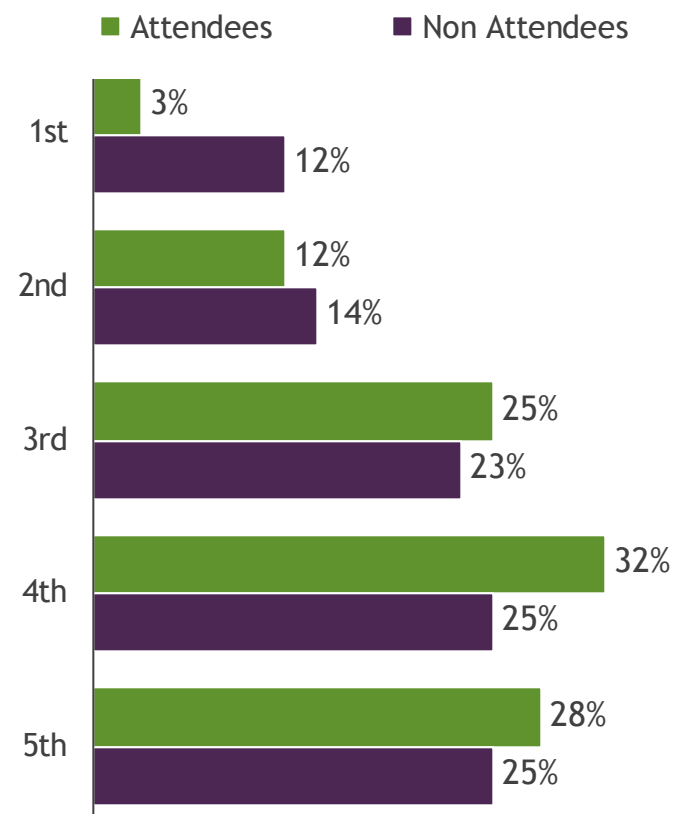
This event offers a fun, engaging and unpredictable day of non-stop car action, trials and stunts. Amongst other things see of world's best precision drivers, the world's first indoor loop-the-loop and other surprise features - all not to mention the ringmasters themselves; celebrity hosts at the head of the motoring mayhem.

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Likelihood of attending



Rank order of appeal

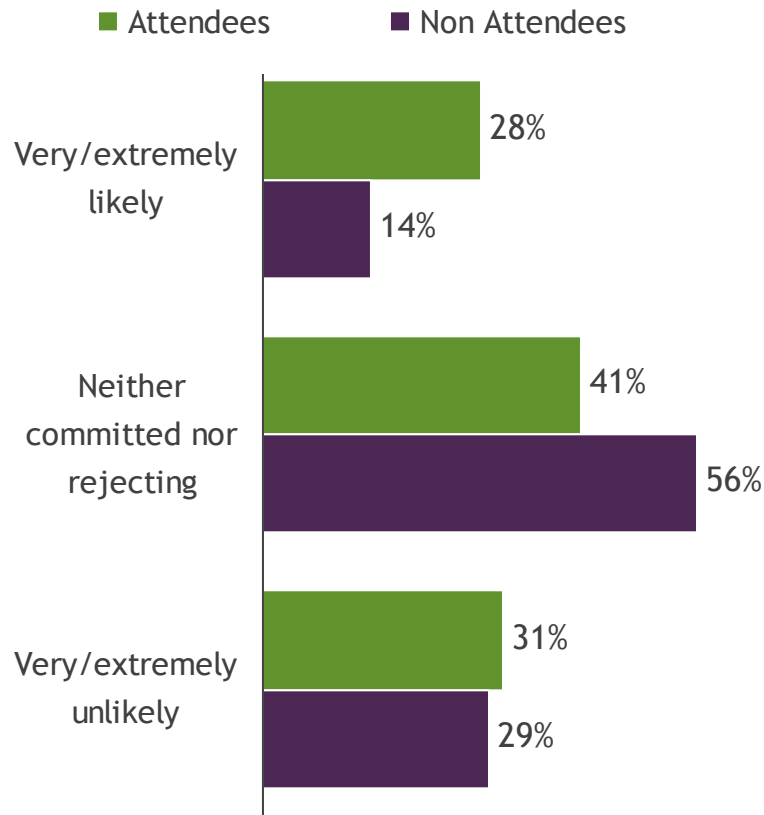


This event is dedicated to green motoring - the latest breakthroughs, the newest models, the latest technology from around the world, including the major manufacturers. The event will demonstrate that it is possible to buy responsibly without compromising on performance or budget. The event will be a fun and interactive day out for all the family

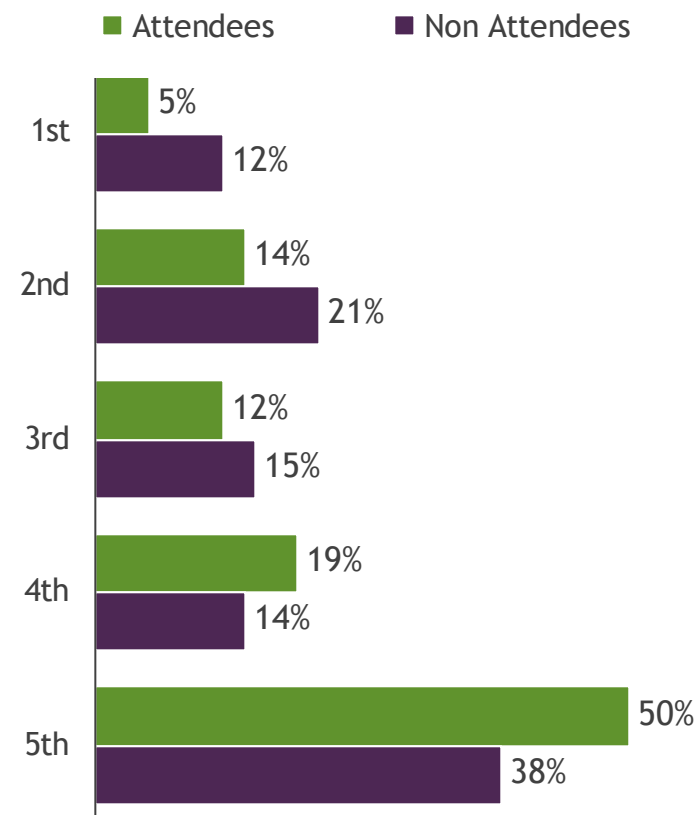


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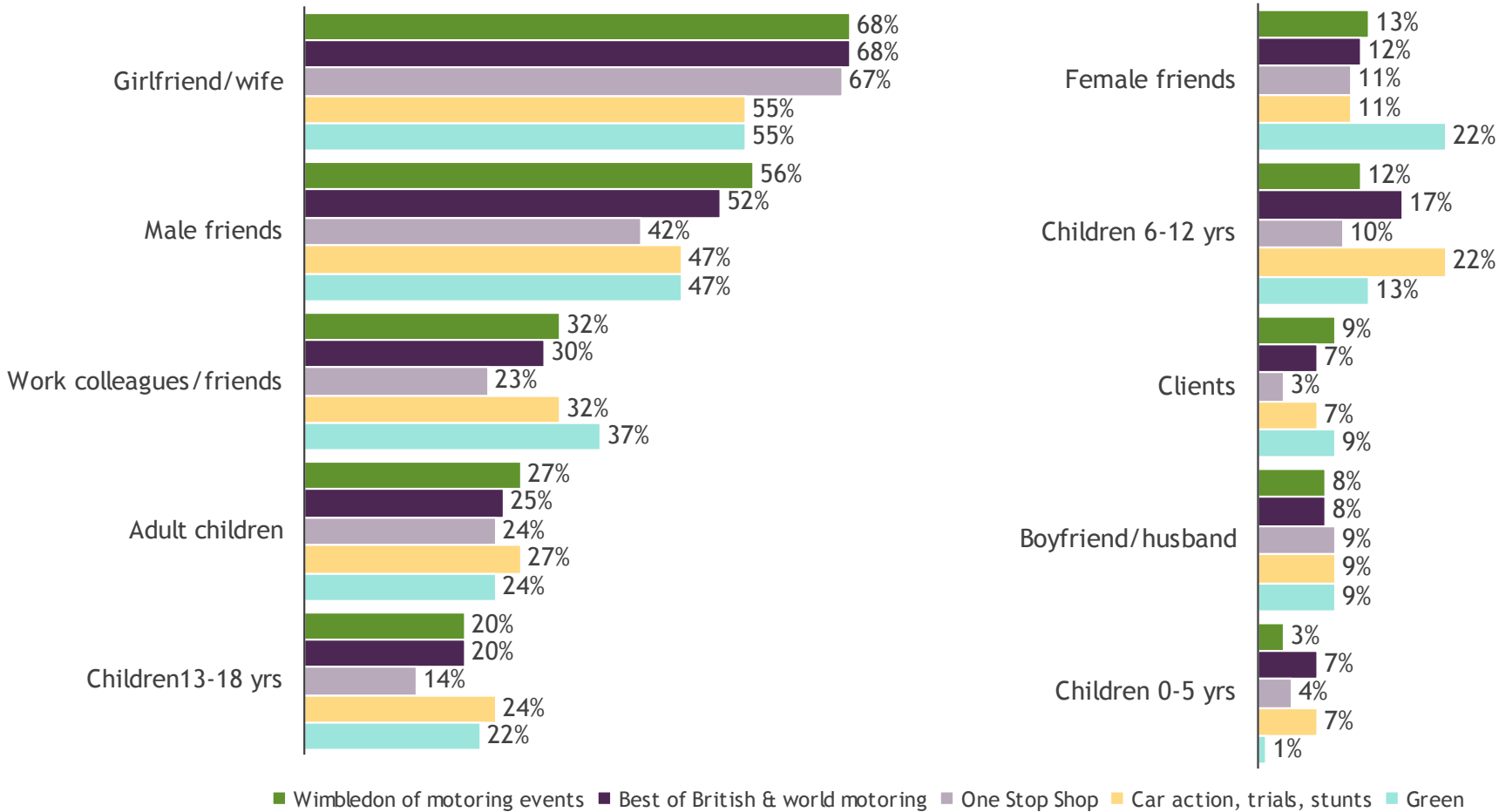
Rank order of appeal



Who would go with

Female partners and/or male friends are most popular companions

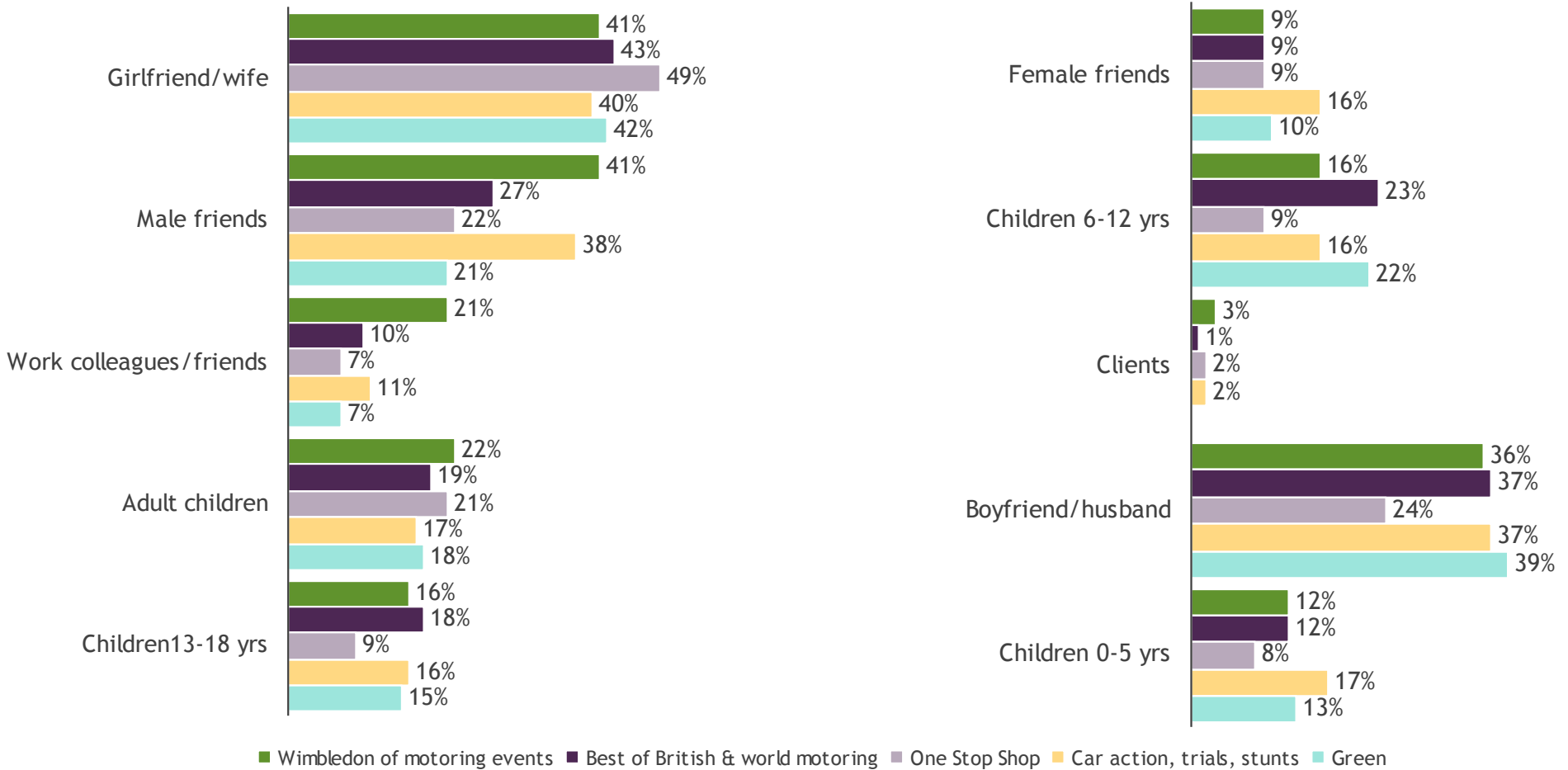
Q7b And thinking about the event ideas you said you were likely to attend, who do you think you would attend with?



Who would go with

Higher proportion of women in Non Attendees sample results in more likelihood that would attend with male partner and very young children

Q7b And thinking about the event ideas you said you were likely to attend, who do you think you would attend with?



Conclusions

There is certainly an appetite for motor shows/events; those who have attended one in the past intend doing so again in the future and even those who have not previously attended seem open to persuasion.

Existing attendees represent a lucrative segment of the car buying public and so retaining their loyalty is paramount; however it seems that there is an opportunity to design an event that could, given tailored marketing, also attract new customers. It seems probable that non car enthusiasts would be most likely to attend a motor show when 'in market'

All are attracted by the possibility of being able to explore the options for their next purchase 'under one roof', within the broader context of a day out. Furthermore there are many other features that both audiences find appealing; classic cars, concept cars, super cars, interactive events, car gadgets, etc.

Thus an event could be designed at the heart of which is a showcase of the current ranges from the major manufacturers and is surrounded by a selection of exhibits, events and activities, some designed for car enthusiasts and others with wider/family appeal. This could represent an evolution of the British Motor Show to be more inclusive, experiential and practical.

Careful marketing could communicate the event selectively to car enthusiasts and the wider car buying public, potentially attracting and delivering to both.