

Women and Motoring

A Research Study on Behalf of
The Society of Motoring Manufactures and Traders



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Introduction

This document summarises the findings from a telephone omnibus survey and two group discussions among women motorists conducted for the Society of Motoring Manufacturers and Traders (SMMT) by Ipsos MORI.

Background and objectives

The SMMT needs to gain a greater understanding of women's role in the motor industry. The main objective of this piece of research is to explore women's buying habits and women's experience of buying a car through different life stages.

Methodology

The research was conducted in two parts for this survey, firstly a quantitative telephone omnibus survey and secondly two qualitative discussion groups.

Omnibus Survey

For the omnibus survey, 805 telephone interviews were conducted in home across Great Britain with car owners, between 13th and 15th April 2007.

Results are weighted by gender, age, social grade, standard region, housing tenure and working status representative of the British population.

Discussion Groups

Two focus groups were conducted in Essex on 16th April 2007 with women motorists with at least one car in their household that they are able to drive. All women within the discussion groups are involved, at least to some extent, in the purchasing decision for the car/s in their household and could own a new, nearly new or used car. For both groups, a mix of women of different socio-economic status was recruited.

The composition of the two groups was:

- **Women under 40 with at least one child under 10 living with them or no children** – Ten women in total took part in this discussion group, five of which had at least one child living with them under 10 years old and five had no children. Five women had a new car and five women had a used car. The age of the main car in their household ranged between 1 and 5 years old. Two women had a Ford Fiesta and the other eight women owned the following cars: Ford Focus, Ford C-Max, Peugeot 106, Renault Megane, VW Lupo, VW Beetle, MG TF and BMW 5 Series.

- **Women 40 and over with adult children** – Nine women in total took part in this discussion group. Three women had a new car and six women had a used car. The age of the main car in their household ranged between 1 and 8 years old. Two women had a Ford Focus and the other seven women owned the following cars: Vauxhall Vectra, Vauxhall Corsa, Honda Jazz, Honda CRV, Nissan Micra, VW Golf and Peugeot 206.

Questionnaire and topic guide

The questionnaire and topic guide was developed specifically for this survey in consultation with the SMMT. The full topline results showing results for the omnibus study and the topic guide can be found in the appendices.

Presentation and Interpretation of the Data

Qualitative research involves an interactive process between the interviewer and those being researched. It provides a way of probing the underlying attitudes of participants, and obtaining an understanding of the issues of importance. The real value of qualitative research is that it allows insight into attitudes, and the reasons for these, which could not be probed in as much depth with a structured questionnaire.

However, it must be remembered that qualitative research is designed to be illustrative rather than statistically representative. In addition, it is important to bear in mind that we are dealing with perceptions rather than facts, though these perceptions *are* facts to those that hold them.

Throughout the report, use is made of verbatim comments from participants. These have been selected to exemplify a particular view of a body of participants, although it is important to remember that the views expressed do not always represent the views of the participants as a whole.

In accordance with the Data Protection Act, verbatim comments are anonymous, although they are accompanied by a reference. Each reference includes details of whether the respondent was in the older or younger age group and where relevant if the respondents in the younger age group had children or not.

Where percentages in the quantitative survey do not add up to 100%, this is due to computer rounding or multiple answers. An asterisk in a chart represents a value of less than one half of one per cent but greater than zero.

Publication of the Data

Any press release or publication of the findings of this survey requires the advance approval of Ipsos MORI. Such approval will only be refused on the grounds of inaccuracy or misrepresentation of the findings.

Acknowledgements

Ipsos MORI would like to thank Nigel Wonnacott from the SMMT in his help in preparing the study and report and all of the women who participated in the discussion groups.

Summary of Findings

Many young women are savvy car buyers and bargain hard for the best deals. They are not afraid of visiting dealerships and the buying experience is generally good, despite showrooms dominated by male staff. Price, appearance and brand are highest on buyers' agendas while safety features and low carbon emissions are far less important. On wider issues, women are generally suspicious about motives for road pricing, were unanimous in their negativity towards the London congestion charge and cite the school-run as a significant contributor to jams.

Six in ten (61%) of women are either solely responsible or had significant input into buying a car in their household and as such the majority visit showrooms when buying cars. Many young women are not afraid to bargain hard for the best deals in showrooms, especially in terms of getting free extras. While the perception is that dealerships are still dominated by men, the experience of buying a car is generally a good one and women do not think that the service they receive is any different because they are a woman.

Some factors are more important to female buyers than others. Price tops the agenda with brand, style, appearance and colour also high up the list. Some show brand loyalty over the course of a lifetime.

The importance of interior space is linked to life stage and is most important to women with young children, but for all women interior space is a *nice to have* rather than of prime importance. As children get older and leave home, interior space becomes less of an issue but for older women there is a need for some to have a larger car to transport grandchildren and elderly relatives.

Safety features are far less important. One of the reasons is that there is a general assumption that safety comes as standard with new cars.

Low emissions featured at the bottom of the agenda. Perhaps unsurprisingly, awareness of the new colour-coded label was also low. Only a quarter of women who have visited a showroom in the last two years, recalled seeing the labels displayed on or near cars.

Most women over 40 felt manufacturers should shoulder the burden for improving the environmental performance of their products, although under-40s said that consumer action was also important.

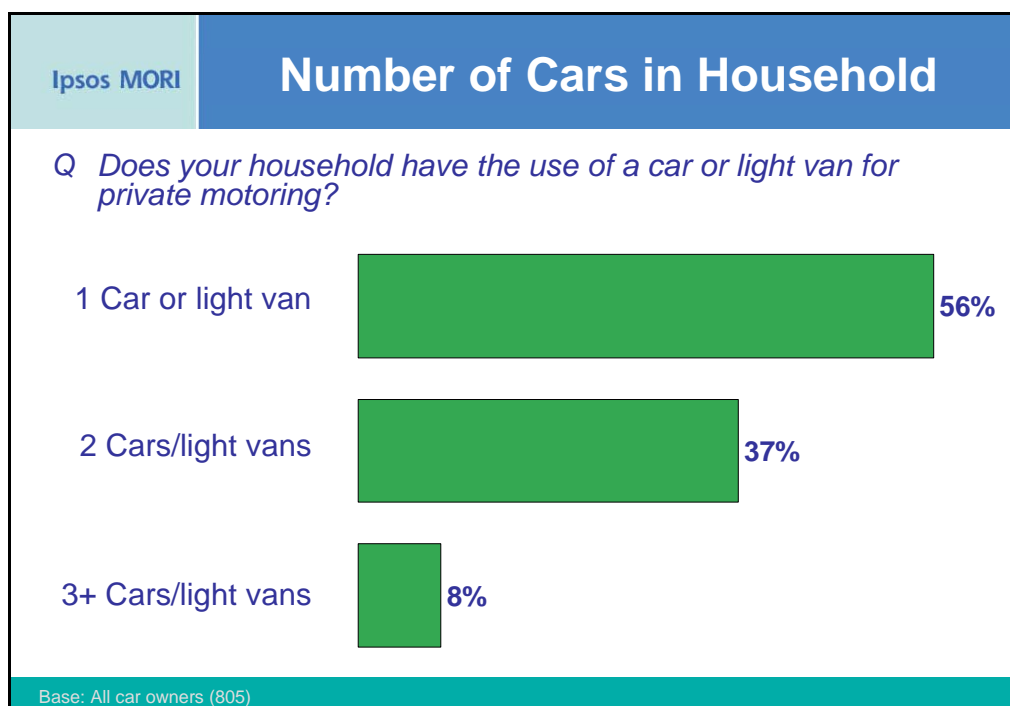
On congestion, some women highlighted the significant role played by the school run, noting that things were significantly better when schools are on holiday. The motivation for road pricing was viewed with suspicion and the London Congestion Charge derided as an unfair tax.

Main Findings

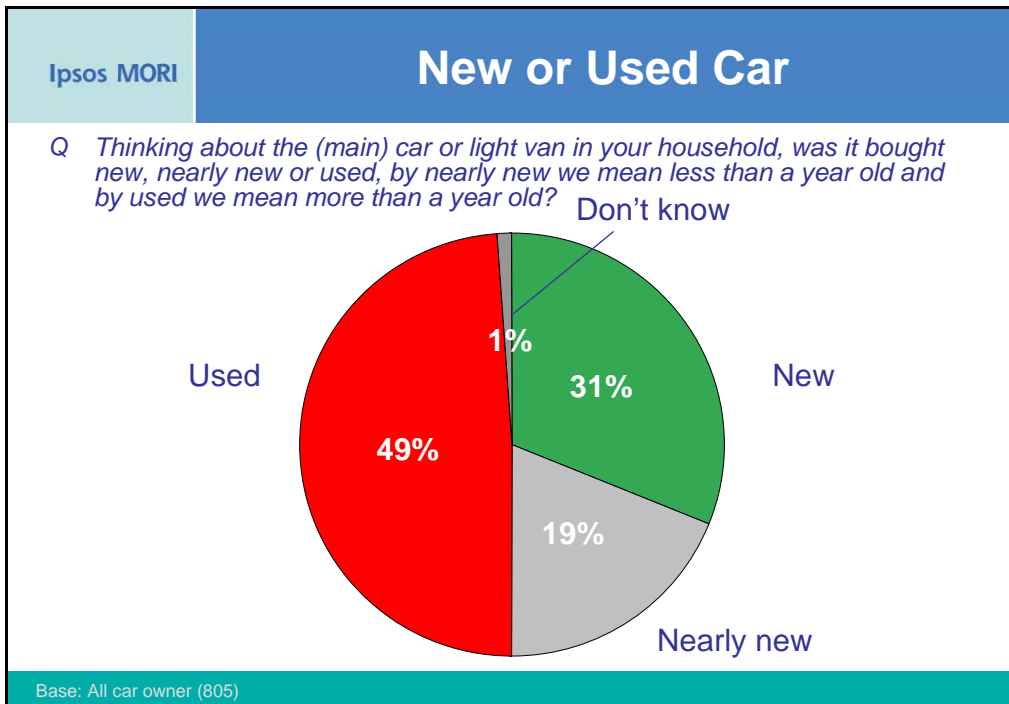
Cars in household

As the previous section indicated, women within the discussion groups own a range of cars that are both new and used.

Within the quantitative survey over half of car owners (56%) only have one car in the household and this is not significantly different for men (54%) compared to women (57%).



One in three car owners have a new car (31%), one in five (19%) have a nearly new and half (49%) have a used car. These findings are not significantly different for men compared to women.



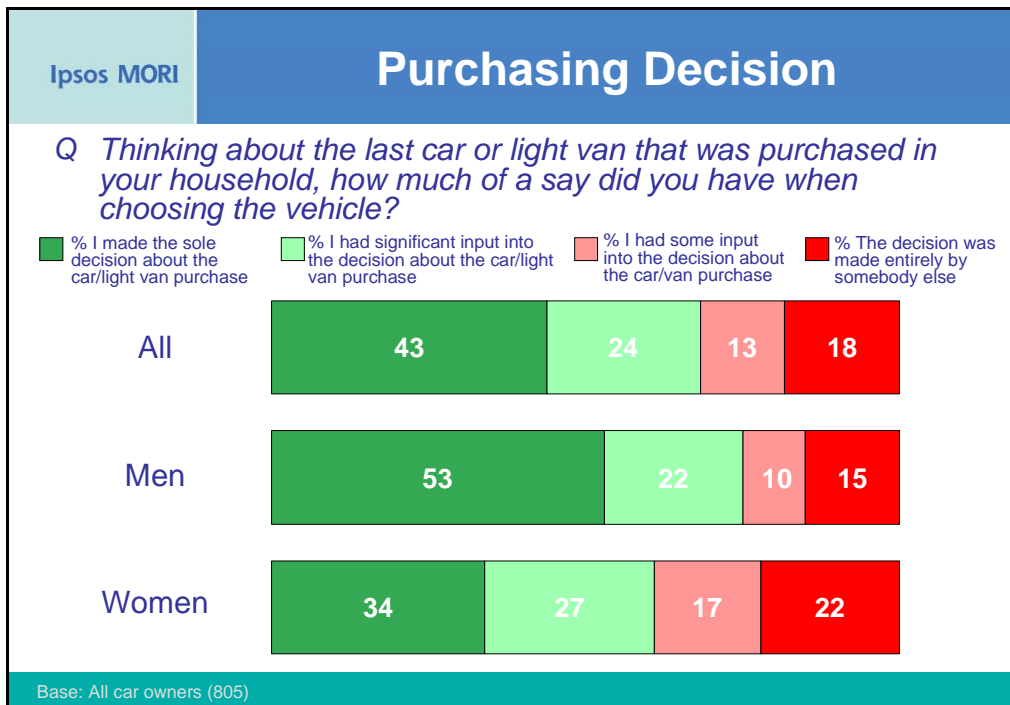
The car buying process

Within the discussion groups all women had some involvement in the car purchasing decision, although these women were recruited on this basis. However, for younger women this is more likely to be their sole decision whereas older women are likely to make the decision jointly with their partner.

“My husband helped me because he paid for it.”

(Over 40)

Within the quantitative survey, two in five say that they make the sole decision over which car to purchase, rising to just over half of men (53%) compared to one third of women (34%). The chart over the page shows that women are more likely to say that they have some input (17% compared with 10% of men) or that the decision is made by someone else (22% compared with 15% of men).



Car Dealerships

The majority of women say car dealerships are the primary source of information when purchasing a car.

“Just went to the dealers and that was it.”

(Over 40)

Many younger women go to dealership by themselves, but most of the older women are accompanied by a partner.

[Did anyone go by themselves?] “Yeab I did.”

(Under 40)

“I’m fine, well it’s one at the top of my road, and I just thought well I’m single, so there was no reason not to do it on my own.”

(Under 40)

“Yeab, I took my partner.”

(Over 40)

On the whole, the experience for both younger and older women at car dealerships is positive.

“I thought they were really good Volkswagen...they were really, really good, and really co-operative...I didn’t feel uncomfortable in front of them or anything.”

(Under 40)

"I have been to the BMW one and they were fantastic, when I had a problem they sorted it and they didn't charge me, they just said "no that's fine"."

(Under 40)

"I enjoyed it."

(Over 40)

"Oh I got flowers, lovely flowers."

(Over 40)

Only two women in the discussion groups did not receive the standard of service that they would have expected when going to the dealership to purchase their current car.

"When they delivered the car, it had wrong wings on it, and the stickers were on wrongly, so they just thought I could take it away because I was on my own, needless to say I didn't."

(Under 40)

"Well I wanted to feel special, I was going and buying a brand new car. But no, it didn't work like that."

(Over 40)

Apart from receptionists, the majority of staff in dealerships are perceived to be male, but women do not think that the service that they receive is any different because they are a woman. They believe that they are treated the same way as males because they are making the decision over which car to purchase.

"No, I was treated the same."

(Over 40)

"They did speak to me, because they knew it was me that wanted the car."

(Over 40)

Younger women, push for *freebies* in dealerships and can be persuasive in negotiating as much as they can get from the dealerships.

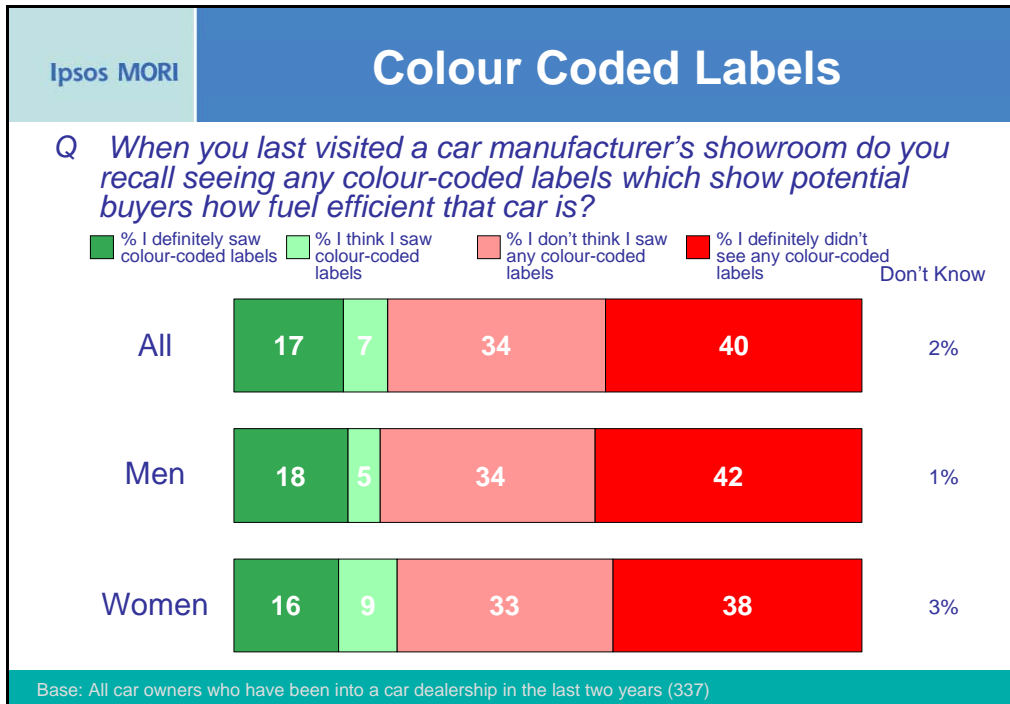
"I try to get most of the freebies really."

(Under 40)

"I think women can be very persuasive."

(Under 40)

Within the quantitative survey two in five (43%) car owners have visited a car manufacturer’s showroom in the last two years and is not significantly different for men (46%) compared to women (41%). When those who had visited a car manufacturer’s showroom in the last two years were asked if they recalled seeing any colour coded labels which show potential buyers the fuel efficiency of the car, three-quarters (74%) did not recall seeing any such labels and again this is not significantly different for men (76%) compared to women (71%).



This may be a concern to an industry which has displayed colour-coded labels since June 2005. However, lack of awareness may be because labels are ignored by the vast majority of buyers who are yet to place emissions high on their radar when buying a new car. This is discussed later in the report.

Other sources of information

Women do not use many sources of information when buying a car, many explained they simply visit a dealer showroom and keep to the same brand that they have always bought.

“No I just stuck with what I knew!”

(Under 40)

“I’d had Fiestas before, and I chose it because it was a Fiesta again, so I knew it, but I just thought “oh I like that one”.”

(Under 40)

“We knew we were going to go for our model when we bought it. We knew what we were going to go for; it was just a question of which one.”

(Over 40)

A minority of women use the internet, but this tends to be to research the best deals, rather than to research different models and model features.

“I looked on the dealers’ websites to see what kind of deals different areas were doing.”

(Under 40)

“I saved £1000, and drove 100 miles. And it was worth it to save £1000.”

(Over 40)

Car magazines are rarely used as part of the buying process and are perceived as a source of information that men use rather than women.

“It’s a man thing isn’t it?”

(Under 40)

The only motoring programme watched by the younger women is ‘TopGear’, but this is viewed as much for entertainment purposes as for information about cars.

“I love it, I love that programme.”

(Under 40)

“They’re just so comical together.”

(Under 40)

“It’s entertaining.”

(Under 40)

“They don’t make it really boring, there’s other car programmes, and it’s all just cars and engines. And it’s just the fact that they’re quite funny and the rapport between them, you think “yeah I could watch this” and kill an hour looking at cars, which normally you’d just think would be really boring.”

(Under 40)

Features that are important when buying cars

Within each of the discussion groups, the group was split in half (making 4 mini groups altogether) and the women were asked to rank which would be most and least important factors in buying a new car tomorrow.

Three out of the four groups considered price as the most important factor and the other group had price as forth most important. Appearance/style, brand and running costs are also considered as being important by all groups. Safety features and low carbon emissions are seen as less important by all groups and space was not important for those without children.

“Price is the most important...and we’re not interested in space particularly because we haven’t got children.”

(Under 40, no children in household)

“Price is really important for us...appearance, style and comfort features...would be quite high up.”

(Under 40, children in the household)

“Well most of us thought that price was the first important because we’re all going by how much we can spend on a car...Then we went for the brand because there were certain brands that we might not feel comfortable with...Appearance and style, we all like a car that looks nice, so that’s pretty important to make us buy it. Running costs were important, again because it’s nice to know that whatever we can afford, we’ll continue to afford it...Performance, just beat space...But it depended, it depends on our lifestyles and who we are and obviously people with big families might consider that space is more important...Safety features didn’t, wasn’t very prominent in our list of things and we didn’t give a monkey’s about emissions.”

(Over 40)

“Well we went for appearance and style first of all because that is important...if you don’t like the appearance you’re not going to buy it so there’s no point, whether it’s cheap or whatever it is, you’re never going to buy it. You don’t get a car that doesn’t look nice...Then we went for the brand because obviously you’ve got your choices of brand and so you’re never going to buy a brand that you don’t. Performance we thought came third because if it’s not going to perform well then you’re not going to be able to rely on it and that is most important isn’t it? Then we went for price, because obviously that figures quite highly. Then we chose running costs because we all drive different size motors don’t we? So therefore the running costs weren’t quite so important to all of us, so we chose it next. Space for the family, there again it didn’t apply to all of us and so we put it lower down. Safety features came quite low on the priorities...we...didn’t think much about low car emissions.”

(Over 40)

Price

Unsurprisingly, price is one of the most important considerations for all women when deciding which car to buy and they tend to be very clear about purchasing within a given budget.

“Affordability as well, but it’s got to look nice.”

(Under 40)

“Mine’s price as well.”

(Under 40)

Some women buy a car that is relatively cheap because they simply want a car for practical purposes.

“Just a relatively cheap run around at the time.”

(Under 40)

For the majority of women they had a price range/limit and they need to find a car that is within that limit, so the price of the car is very important to them.

“It’s the price really, everyone must have a price range that they can go up to, whether they go over it a little bit or whatever, but they’ve got to have some sort of price range, or think anyway, well I have, I don’t know about anyone else.”

(Under 40)

“Well I had a price limit I could go to I knew what I could afford and I stuck to that.”

(Over 40)

Some women explained they would buy a more expensive car if they were able to and aspire to own a different car to the one that they have.

“Yeab I think if I had more money I would have something different, and again if I had a family I would have something bigger, but it’s just me and it’s all I can afford.”

(Under 40, without children)

Running costs

Tied to price, running costs are also factored into the buying decision.

“I wouldn’t be able to afford to have something that’s really juicy, so if I’m looking for a car, then I have to put that into perspective.”

(Under 40)

“I think that’s very important.”

(Under 40)

When considering running costs, some women are looking for a car with good miles per gallon so that fuel costs are kept to a minimum.

“To get good mileage, yeah, that was important, yeah”

(Over 40)

“Low mileage, cheaper insurance and tax”

(Over 40)

One woman explained that she may purchase a diesel car in the future because of the lower costs associated with diesel cars.

“I’m going to be looking for a diesel because it’s more economical, yeah we’ve just decided that recently in the last week or so we’ve just seen petrol prices creeping up. And we’ve decided that we’re going to go for a diesel, and just hopefully that will be cheaper for us in the long run.”

(Under 40)

Brand

When purchasing a new car, many women have one brand of car that they like and just stick to it, often showing brand loyalty over a course of a lifetime.

“Mine was for the brand I’ve always liked BMWs”

(Under 40)

“Yeah, we knew we were going to go for our model when we bought it. We knew what we were going to go for, it was just a question of which colour.”

(Over 40)

Brand perception is often linked to price; many women who can afford a prestigious brand say they are going to buy one and for those who cannot afford a prestigious brand at the moment aspire to have one in the future.

"It's just circumstance, if you can afford to have a nice brand you would."

(Under 40)

"I can afford to change the car because I don't like the name [brand], a lot of people can't."

(Under 40)

"Well I love BMWs... I know a couple of people that have had BMWs, and they've said how safe they are and sturdy and they're reliable. And I would just love to have a BMW one day, that is my thing, but at the moment it's being able to afford it."

(Under 40)

Appearance/Style

What the car looks like is very important to the majority of women and colour of is one of the prime considerations.

"I liked the colour; I liked the colour of mine."

(Under 40)

"Colour, I'd say the colour is what's important."

(Over 40)

"I loved the colour. And I had to have the colour... Peppermint. Nice."

(Over 40)

"I liked the colour; it was a nice dark green."

(Over 40)

"Range of colours, but female colours, not male."

(Over 40)

"Yeab, there's a pink, the [Honda] Jazz is pink, yeab."

(Over 40)

For a minority of women the appearance of the car is unimportant.

"It doesn't bother me. As long as it starts every morning, which it's made to be, I don't care what it looks like."

(Over 40)

Exterior size

The exterior size of the car is important to some women, but opinions differ over if women want a small or large car. There was a sense that safety improved with vehicle size, and greater visibility.

“I just found it very appealing for me, it was only a, it’s only one litre Lupo, so it was just perfect for me to travel in, nice and light and fun.”

(Under 40)

“We wanted a smaller [car] and our car was older so we wanted to update ours, something smaller and economical, so that’s why we got the Focus.”

(Over 40)

“I wanted a more solid car because I’d had an accident in a smaller car and I wanted something that was a bit, that I felt safer in.”

(Over 40)

“You do feel safer in a big, in a higher car.”

(Over 40)

Interior space and life stage

The need for interior space changes to some degree with life stage. However, even though space is more important to some women than others, for all women space is a *nice to have* rather than of prime importance.

[So it’s like a nice to have, but other things are going to be more up the top of the list?] “Yeab”

(Under 40, without children)

Interior space for young women without children is fairly unimportant.

“Yeab I think, I do use my car for work as well, but at the moment not having any children it doesn’t matter to me that I don’t need four seats, that if I’ve got a two seater it doesn’t make any difference. But I do like to have quite a bit of boot room now.”

(Under 40, without children)

However, these women do believe that this could change in the future if they have children.

“At the moment my partner and I have got a car each... eventually once we start a family, then I think we’ll just have the one car between us, and we’d go for something bigger, and I just think that your decisions change as your life changes I think.”

(Under 40, without children)

“A lot of my friends that have got young children look for a bigger car, so that they can put the pushchairs and the baby seat and everything.”

(Under 40, without children)

While the women in the discussion groups with children have young children, they are not toddlers anymore. However, some of these women had to have a larger car when their children were babies.

“Yeab, because you can’t get a pram in.”

(Under 40, with children)

“Yeab you have no choice.”

(Under 40, with children)

As children get older, interior space again becomes less of an issue.

“It’s not as hard as it used to be when they were little.”

(Under 40, with children)

“But then I’ve found that as they’ve got older they’re obviously not in pushchairs.”

(Under 40, with children)

Although, space is still an issue to some degree as families cannot cope with two-seater cars.

“We had a TT and we had to change it because the backseat wasn’t so good, he got to four [years old] and he just couldn’t sit in the back any more, so we had to change it.”

(Under 40, with children)

As women get older, while they do not need a large car for their older children, there is a need for some women to have a larger car to transport their grandchildren and elderly relatives.

“I’ve just had two new grandchildren, so I wanted it to put the double pram in the back, and the height but not the bulk. And the Honda’s just about right. And I won’t part with it, even when I don’t need it.”

(Over 40)

“Yeab, it has to be four doors. With a hatch...I wanted the space for the three grandchildren, and it’s hatchback and it’s very roomy.”

(Over 40)

“Well I’ve always had smaller ones till the grandchildren came along and now I’ve got this great big one, so I’ve gone in reverse.”

(Over 40)

However, some women with adult children revert to getting smaller cars; this could be because their children are older and away from home or because their grandchildren are also older.

“Not so much of a taxi now.”

(Over 40)

“Yeab, they’ve got their own cars, yeah, they can run themselves around.”

(Over 40)

“Because I always wanted one [a mini] and it’s a car for me now. So, my grandchildren are getting older so it won’t be a problem getting them in the back.”

(Over 40)

“Space is obviously an issue for me, because we went from a bigger car to a smaller car anyway, but there’s enough space and there’s only two of us who mainly drive it, so.”

(Over 40)

Reliability

For some younger women in the group reliability was important, mainly because they are more likely to buy used cars so of primary importance to them is that the car is reliable.

“It is reliability really, I want something that’s reliable, because I think if I ever broke down I’d just cry, I would hate that, I definitely think it’s reliability.”

(Under 40)

Safety features

For the majority of women, safety features are unimportant when considering which car to purchase.

“I didn’t particularly look for safety features.”

(Under 40)

However, this is mainly because women tend to presume that new cars will be safe and are fitted with latest safety features. So while it is important to women that their car is safe, it is not a purchase criterion as they just presume this will all come as standard anyway with new cars.

“I think the newer cars should definitely be spot on with the whole safety thing... I wouldn't buy a car if it didn't have air bags, and things like that I think safety is quite important, but I think I just expect it with the cars really.”

(Under 40, without children)

“I just expect them.”

(Under 40)

“I think you assume with a brand new car you get it anyway.”

(Under 40)

“Air bags and things like that just come as standard anyway.”

(Under 40)

“And most new cars do have all the safety features don't they?”

(Over 40)

A few older women in the group said they find airbags daunting.

“Really aware that they're there and I think they're daunting. I think if there's an accident, I can't image the impact. I can't image having an airbag on impact, go into me. I can't imagine.”

(Over 40)

EuroNCAP is a safety consortium that tests cars for crash worthiness and awards star ratings for occupant, pedestrian and child protection. These are based on simulated crash tests. Women in both groups were asked if they had heard of this and the vast majority had not heard of Euro NCAP. When asked if they would want to know about this for any future car purchases the younger women thought that it would be useful but the older women were much less interested as they did not think that it would be of any use to them.

“Yeab, for my next car definitely, yeab.”

(Under 40)

Environmental features

For all women, environmental features are much less important when purchasing a car and most think that it will be unimportant for future cars purchased.

“Simply didn't come into it really.”

(Over 40)

“It should be, but it isn't.”

(Under 40)

“We didn’t give a monkey’s about emissions.”

(Over 40)

One young woman has considered buying a diesel car because it is better for the environment, but other women in the group did not have a positive impression of diesel cars.

“I would like to go to a diesel next time because of the environmental guilt thing.”

(Under 40)

“The soot that comes out of it, it sinks doesn’t it it’s horrible, chugga, chugga, chugga, horrible”

(Under 40)

“They are very noisy.”

(Under 40)

On the whole, older women have concerns about electric and hybrid cars and have a slight fear towards them.

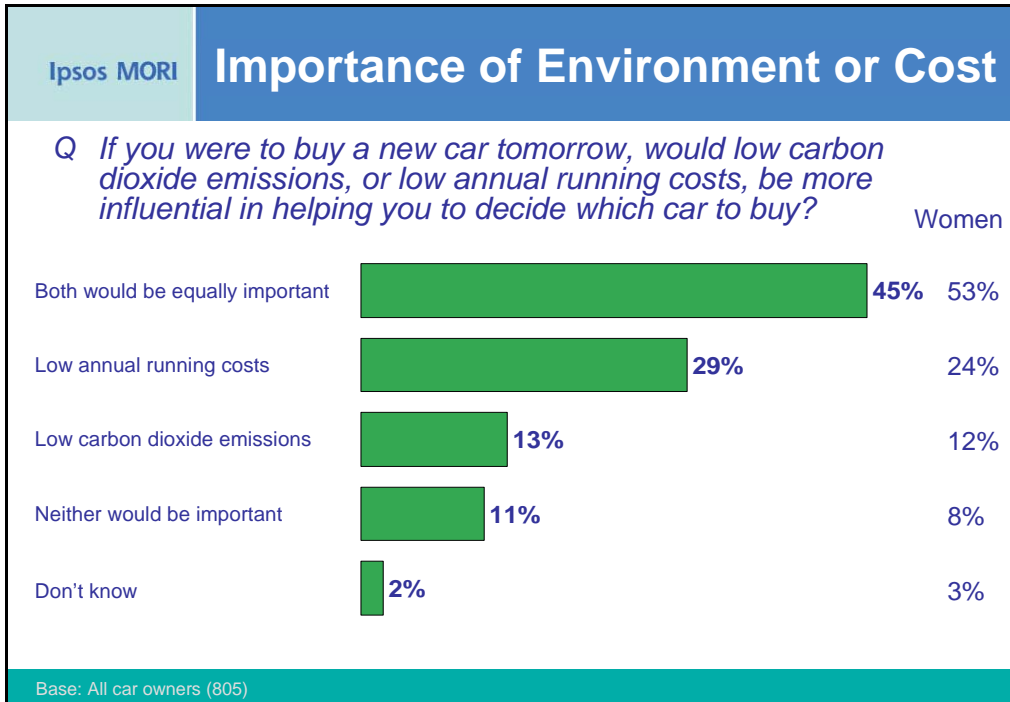
“Do you know, I get frightened of them.”

(Over 40)

“Well, say you plug it in overnight and you haven’t plugged it in long enough, I know the engine’s meant to start when the electric runs out, but what if it didn’t? And you’re on the motorway or something?”

(Over 40)

Despite cost being seen as more important than the environment within the discussion groups; the quantitative survey shows that nearly half (45%) view both as being equally as important over influencing which car to buy and this rises to 53% for women. However, similar to the discussion groups, when choosing between the two low annual running costs (29%) is viewed as more influential than low carbon emissions (13%) and this pattern remains when examining women’s views only (24% compared with 12%).



Despite CO2 emissions featuring at the bottom of most buyers' agendas, most women in the groups think that manufacturers should play more of a role in helping to reduce emissions.

"Yeah I think they should, yeah."

(Under 40)

"Yes, they can reduce the emissions yes, significantly"

(Over 40)

However, many women believed that manufacturers are not committed to doing anything to reduce emissions. They think this is partly due to a failure to convince consumers to buy low emission cars, while acknowledging a chicken and egg situation: without consumer demand for more environmentally friendly cars, manufacturers will not make them.

"They don't care, no they don't care do they, because people still buy these high emission cars, they don't care."

(Under 40)

"If they can sell more high emission cars than the low ones, they're not going to do anything to change that are they?"

(Under 40)

"They might manufacture 50% more environmentally friendly cars, but you've still got to get 50% of the people to come in and buy them."

(Under 40)

“So I think it’s still down to the consumer, just as much as it is on the part of the manufacturer.”

(Under 40)

Other features

For some older women having an automatic gear box is important and for all older women power steering is important.

“I drive automatic only, not manual so I was looking for an automatic.”

(Over 40)

“Obviously power steering is quite important because it’s quite heavy on the arms if you’re trying to turn in a tight space.”

(Over 40)

Older women would also like the engine to be more user friendly. They suggest that the parts under the bonnet could be labelled A to Z and have corresponding letters in the manual.

“Under the bonnet, I would like a car that was labelled A to Z and in the manual it was labelled A to Z. Not your pictures, because when I look under my bonnet I just think, “right”, and close it down again....Because you’ve got this picture and you’ve got all these little bits and you think, “oh well, I don’t know what that stuff is”, close it down again.”

(Over 40)

These women are reluctant to do work under the bonnet and perceive this to be a *man’s job*.

“I think women are reluctant aren’t we? We’re reluctant really to do that sort of thing because we do so many other things, no you do tend to leave it to the male.”

(Over 40)

Congestion

Many women in both groups are affected by congestion.

“Oh yeah work and the weekends, it’s just so busy round here all the time”

(Under 40)

However, many women cannot see a solution to the congestion problem and do not think that it will get better.

“Well nothing will be done.”

(Under 40)

There are suggestions that public transport should be improved, but women are unconvinced that there is adequate investment.

“More money spent on public transport, making it safer to car share, but they don’t do they?”

(Under 40)

Some of the younger women take their children to school by car, but this does not affect their choice of car or their opinion of congestion/congestion charging. Some of the older women think that congestion is bad when children are being taken to school and think that children should walk more to school.

“Well, you can walk the kids to school.”

(Over 40)

None of the women within the two discussion groups support congestion charging. They see this as simply another form of tax and do not think it has helped to reduce congestion.

“I just think that’s wrong.”

(Under 40)

“It’s disgusting, absolutely disgusting.”

(Over 40)

“It’s outrageous.”

(Over 40)

“It’s another way of getting more money.”

(Under 40)

“Mr Livingstone’s definitely not spending their money on making public transport safer and cleaner.”

(Under 40)

“Don’t think it’s made any difference.”

(Over 40)

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Checked & Approved:

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Rebecca Klahr

Checked & Approved:

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Gemma Decent

Appendices

Topline

- Results are based on 805 telephone interviews in home across Great Britain with car owners, between 13th – 15th April 2007.
- Interviews were conducted as part of the Ipsos MORI telephone omnibus.
- Results are weighted by sex, age, social grade, standard region, housing tenure and working status representative of the GB population.
- Please note all figures are expressed in percentage terms. When they do not sum exactly to 100%, this will be due to computer rounding or multiple response answers. An asterisk (*) denotes a figure less than 0.5% but greater than zero.

Unweighted base sizes and Weighted percentages are shown

BASE: ALL RESEONDENTS (1,011)

Q1 **Does your household have the use of a car or light van for private motoring?**
%

1 car or light van	44
2 cars/light vans	29
3+ cars/light vans	6
None	20
Refused/don't know	-

BASE: ALL CAR OWNERS (805)

Q2. **Thinking about the (main) car or light van your household, was it bought new, nearly new or used. By nearly new we mean less than a year old and by used we mean more than a year old?**

	%
New	31
Nearly new	19
Used	49
Don't know	1

BASE: ALL CAR OWNERS (805)

Q3. **Thinking about the last car or light van that was purchased in your household, how much of a say did you have when choosing this vehicle?**
%

I made the sole decision about the car/light van purchase	43
I had a significant input into the decision about the car/light van purchase	24
I had some input into the decision about the car/light van purchase	13
The decision was made entirely by somebody else	18
Don't know	*

BASE: ALL CAR OWNERS (805)

Q4. **If you were to buy a new car tomorrow, would low carbon dioxide emissions, or low annual running costs, be more influential in helping you to decide which car to buy?**
%

Low carbon dioxide emissions	13
Low annual running costs	29
Both would be equally important	45
Neither would be important	11
Don't know	2

BASE: ALL CAR OWNERS (805)

Q5. **Have you visited a car manufacturer's showroom in the last two years, for example an Audi, Volkswagen or Ford dealer?**
%

Yes	43
No	56
Don't know	*

BASE: ALL WHO HAVE VISITED A CAR MANUFACTURER'S SHOWROOM IN THE LAST TWO YEARS (337)

Q6. **When you last visited a car manufacturer's showroom do you recall seeing any colour-coded labels which show potential buyers how fuel efficient that car is? These look like the fuel efficiency labels you find on new fridges and washing machines in electrical shops.**
%

I definitely saw colour-coded labels	17
I think I saw some colour-coded labels	7
I don't think I saw any colour-coded labels	34
I definitely didn't see any colour-coded labels	40
Don't know	2

Discussion Guide

Introduction

Thank respondents for coming

Introduce self, note taker and observer from SMMT. Role of Ipsos MORI – researcher, gather all opinions (independent and confidential)

Explain purpose of research – want to know more about your experience of buying car. All opinions valid, disagreements OK

Housekeeping - toilets, fire exit, refreshments, mobile phones
Get permission to record

Ice breaker: Names and one thing about the car that they currently drive. PROBE: how old the car is, if new, nearly new or used.

For young mothers – age of children

Choosing the car currently driven

Thinking about the car that you drive the most often, how much of a say did you have in the car that was bought? PROBE: Input of partner and other family members. Why did you choose to buy this car?

PROBE:

Safety features

Appearance / style

Space for the family

Performance (e.g. engine size and speed)

Low carbon dioxide emissions

Brand (e.g. BMW / Audi)

Running costs

Price

Why were these things important or not important?

What was the most important factor when choosing this car? Why?

The buying experience

Where did you/do you find information about buying your car? PROBE: books, internet, magazines, newspapers, dealerships, manufacturers, friends/family etc
PROBE: Which internet sites, magazines, newspapers, manufacturers

Did you visit a dealership when you purchased your car?/ Have you ever visited a dealership when purchasing a new car?

IF NO: Why not?

IF YES: Did you visit the dealership on your own, or with a partner or other family members? What was this experience like?

How were you treated by the staff in the dealership? PROBE: friendliness, professionalism, speed of service, explaining vehicle credentials.

Do you think male and female customers are treated differently by dealership staff?

Were women representatives present in the showroom? PROBE for any differences in attitudes of men and women staff.

What kind of questions did you have before you went to the dealership?
Was the dealership able to answer all of your questions satisfactorily?

Buying a new car now

Imagine that you were buying a new, nearly new or used car tomorrow. What would you look for when buying a car?

PROBE:

Safety features

Appearance / style

Space for the family

Performance (e.g. engine size and speed)

Low carbon dioxide emissions

Brand (e.g. BMW / Audi)

Running costs

Price

Priorities when buying a car: Breakout activity

Moderator: Get participants to divide into two mini-groups and explain task. In group 1 divide into young mothers and childless women

Distribute shuffle cards of important aspects when buying a car, rank these and any others respondents think are important when buying a new car.

Ask break out groups to report back to the group as a whole on important/less important aspects and then all the chance to comment on these.

Life stage and influence over car purchase

Young Mothers

How, if at all, have your motoring priorities changed since having children? PROBE: interior space (seating), seat configuration, boot space, bodystyle and type of car e.g. people carriers, interior storage, technology features, safety features

What was the most important factor in car choice before having children? What is the most important factor now?

Do you take your children to nursery/school by car? IF YES: Did this have an impact on your choice of car? Have you considered other ways of getting your children to school e.g. public transport, walking? Why/Why not?

Women post children

How, if at all, have your motoring priorities changed since your children left home? PROBE interior space (seating), seat configuration, boot space, bodystyle, exterior style, interior storage, technology features, economic factors

What was the most important factor in car choice before having children? What about when your children were younger? And what is the most important factor now?

When your children were at school, did you take them by car? IF YES: Did this have an impact on your choice of car? Did you consider other ways of getting your children to school e.g. public transport, walking? Why/Why not?

All

Overall, how have changes in your personal or household circumstances changed your priorities over car choice? e.g. getting married, new job, having children, moving house.

General motoring opinions

Safety

How important are safety and security features when choosing a new car? PROBE: air bags, ISOFIX child seats, side impact bars, immobiliser, alarms

Does your car currently have these features? Is this something you would look for in a new car?

Do you know the Euro NCAP rating for your current car?

FOR THOSE WHO ARE NOT AWARE OF EURO NCAP. Explain: Euro NCAP provides motoring consumers with a realistic and independent assessment of the safety performance of some of the most popular cars sold in Europe. Each car is given a star rating for adult protection in the car, pedestrian protection and from 2003 child protection in the car.

FOR THOSE WHO KNOW THEIR RATING: How important was this rating over your choice of car?

FOR THOSE WHO DO KNOW THEIR RATING: Would this be useful for you to know? If the Euro NCAP rating of a car was poor would this affect your choice of car?

Running costs

How important are running costs when choosing new car? PROBE petrol, maintenance, cost of purchasing a car. Why/why not?

Environment

How important are environmental features when choosing new car? PROBE hybrid cars, electronic cars, size of car, emissions, road tax bands. Why/why not?

What do you think that manufacturers could do to help cut the emissions that cars produced? Should manufacturers be doing anything? Whose responsibility is it?

Road pricing and congestion

Does traffic congestion affect you on a day-to-day basis? How? PROBE: School run for those with school age children

What should be done to help reduce congestion on Britain's roads? PROBE: opinion of congestion, charging in city centres (Central London and local initiatives) and more general national road pricing schemes.

Key messages

Imagine you were buying a new car tomorrow, what would be the most important feature when choosing a particular model?

What would be the most important source of information that you would use when buying a new car?