



CONSUMER ATTITUDE SURVEY

Fieldwork Dates: 27 - 28 September 2023

Consumer Attitude Survey - All figures, unless otherwise stated, are from YouGov Plc. Total sample size was 2081 adults. Fieldwork was undertaken between 27 - 28 September 2023. The survey was carried out online. The figures have been weighted and are representative of all UK adults (aged 18+).

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Introduction

The National Franchised Dealers Association (NFDA) is pleased to present the return of the **Consumer Attitude Survey**, last issued in 2019. The survey has been restructured, with questions tailored to provide more detailed insights into consumers' perceptions of franchised retailers amongst UK driving license owners. This is the first issue of the re-modelled survey.

The study, executed by YouGov Plc, polled 2,081 driving license holders across the UK in an online survey.

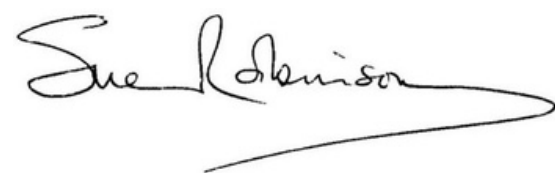
The survey is undertaken with these major objectives:

- Explore current market perceptions of franchised dealers
- Understand current consumer perceptions regarding Electric Vehicles
- Examine factors influencing consumer spending decisions
- Assess awareness and understanding of preferred purchasing options

Overall, it is encouraging that satisfaction levels with the service provided by franchised dealers are high for most of the respondents. Additionally, consumers continue to see franchised dealerships as the most trusted places for selling and servicing electric vehicles. The results of the survey are analysed to help franchised retailers understand and, where necessary, improve their performance sectors, such as EVs.

Sue Robinson

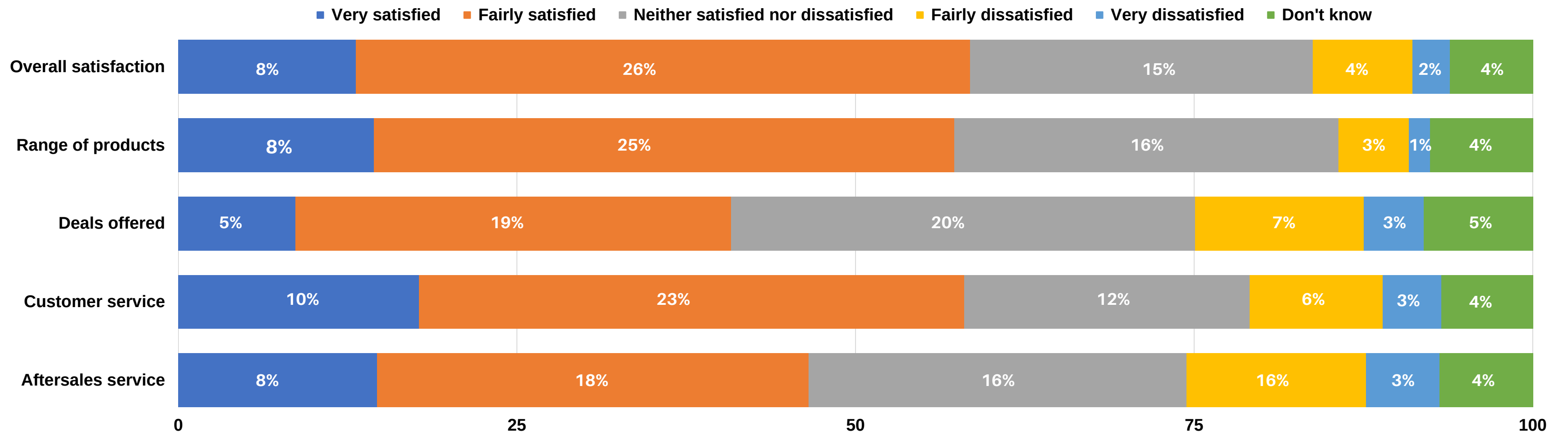
Chief Executive, National Franchised Dealers Association

A handwritten signature in black ink, appearing to read 'Sue Robinson', with a long, sweeping horizontal line extending from the end of the signature.

30 October 2023

Nearly 34% of UK adults holding a driving license express satisfaction with the range of products, customer service, and their overall experience.

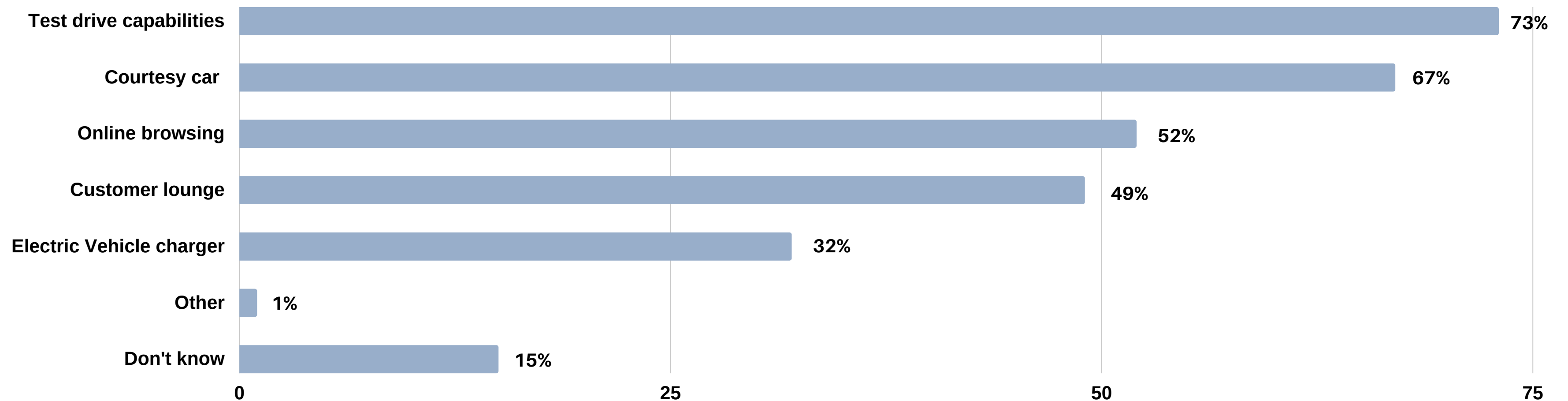
Q1 - To what extent, are you satisfied or dissatisfied with each of the following with respect to using "Franchise dealerships" when buying a vehicle?



- While around 42% of UK adults holding a driving license have never used a franchise dealerships to buy a vehicle

Nearly 3 quarters of UK license holders (73%) expect the availability of test drive options and access to courtesy cars when dealing with a franchise dealership

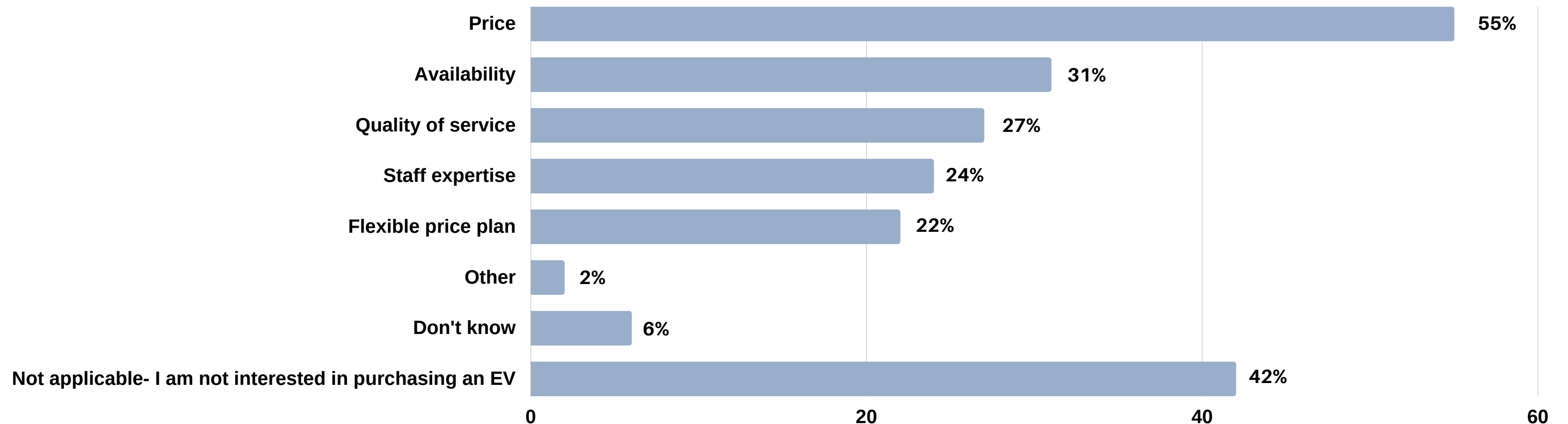
Q2 - For the following question, even if you have never bought a vehicle from a franchise dealership, we are still interested in your opinion...Which, if any, of the following facilities do you expect to have from a franchise dealership? (Please select all that apply)



- 73% of respondents expect test drive capabilities and 52% expect online browsing to be available from a franchise dealership.

42% of license holders in the UK are not interested in purchasing an electric vehicle.

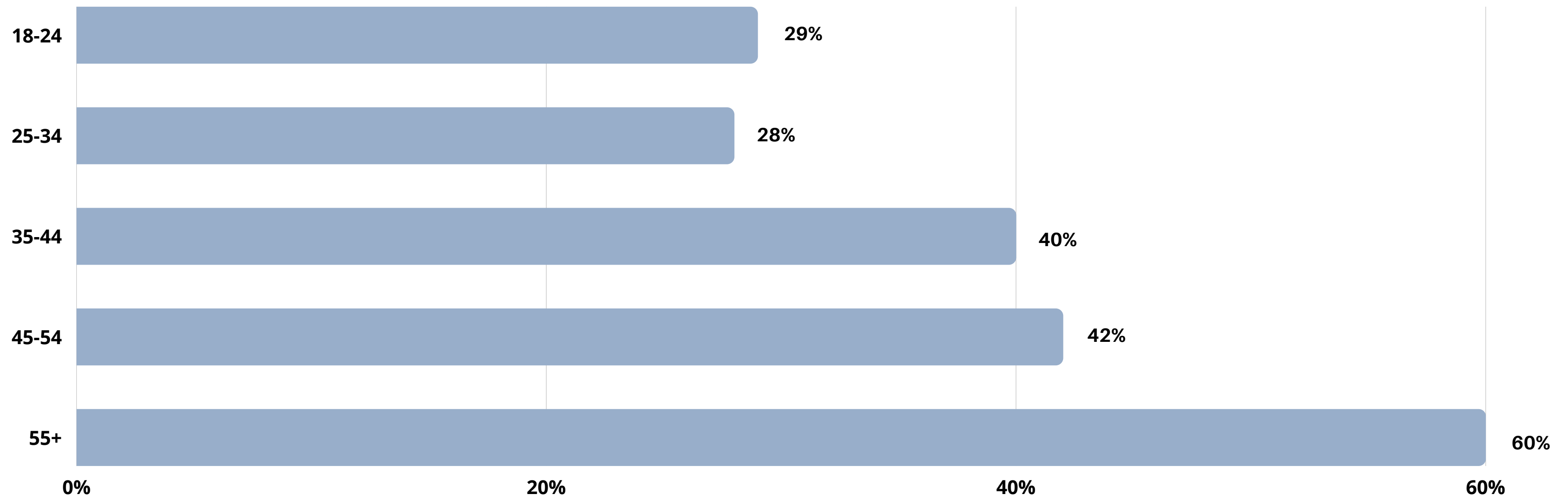
Q3 - Now thinking specifically about Electric Vehicles (EVs)...Which, if any, of the following are reasons why you would choose a franchise dealership if you were purchasing an EV? (Please select all that apply)



- Of those interested, 31% stated the availability of EV models as a reason why they would choose a franchise dealership.

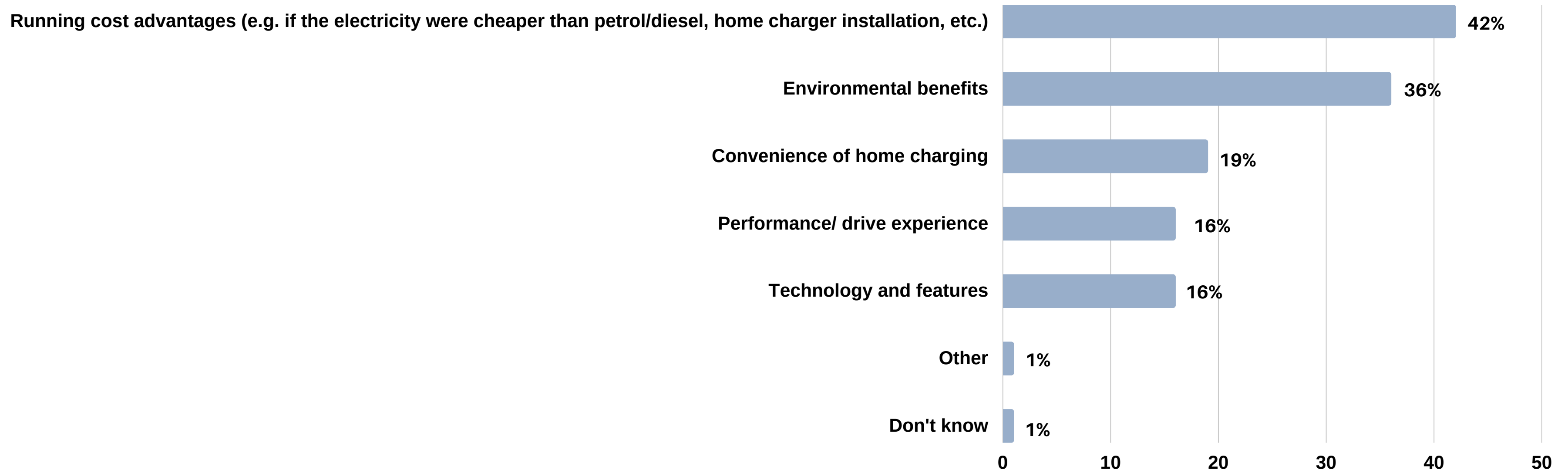
The majority of respondents who are not interested in buying an EV are over the age of 35, the younger generation are more inclined to switch

Age breakdown of respondents who are not currently interested in buying an electric vehicle



When considering the factors that would encourage them to purchase an electric vehicle, running cost advantage was the most commonly selected option at 42%

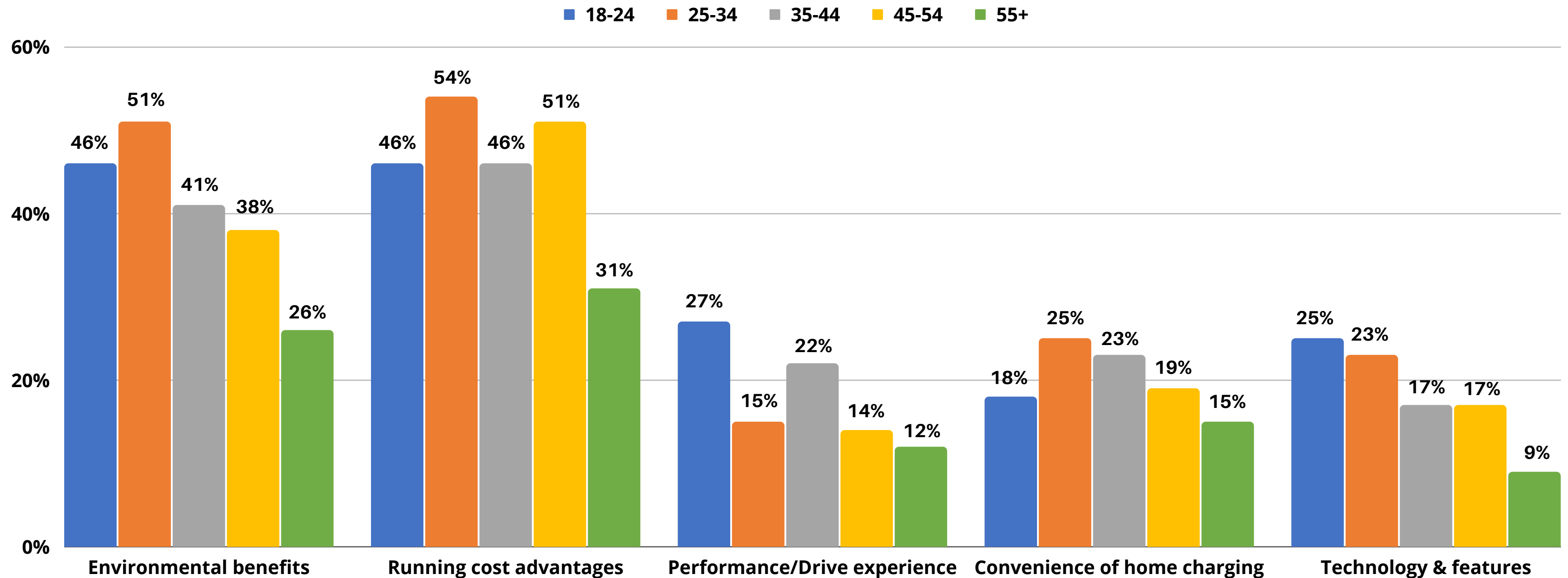
Q4 - Which, if any, of the following are reasons why you would buy an electric vehicle? (Please select all that apply)



- 46% of respondents claim they are not currently interested in purchasing an electric vehicle.

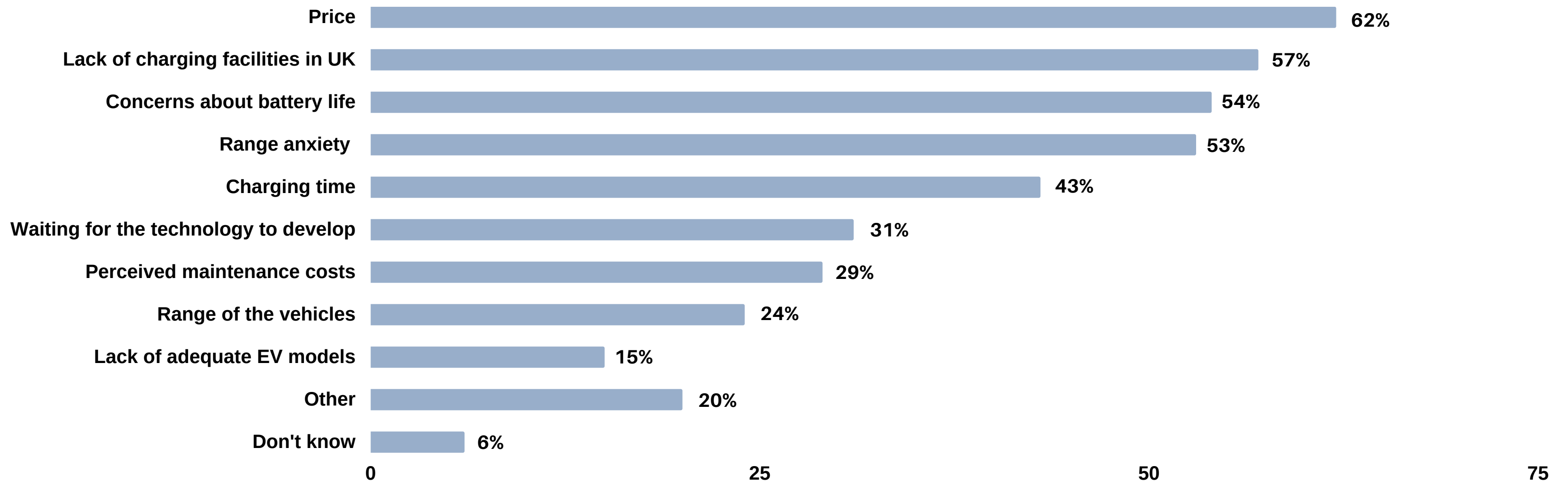
Environmental benefits and running cost advantages are leading influences to purchasing an electric vehicle

The following reasons why respondents WOULD buy an electric vehicle (age breakdown)



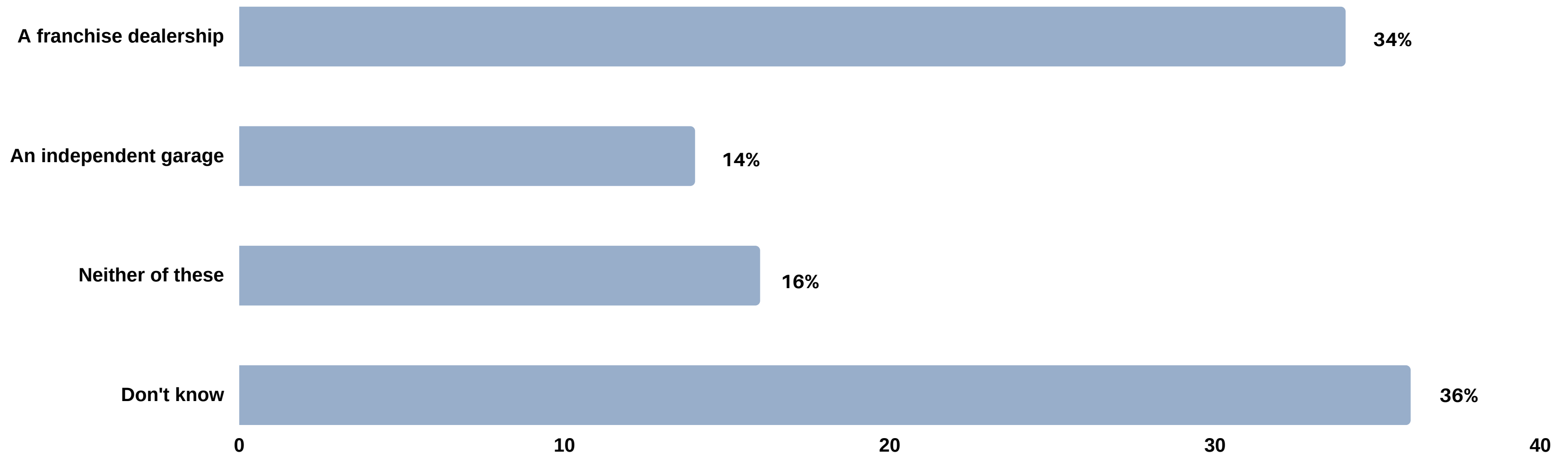
Of UK driving license holders who aren't interested in purchasing an electric vehicles state price as the main factor (62%), followed by lack of charging facilities in the UK (57%)

Q5. You said that you are not currently interested in buying an electric vehicle...Which, if any, of the following are reasons for this? (Please select all that apply)



Majority of UK license holder trust a franchise dealership (34%) over an independent garage(14%) for their knowledge and expertise on electric vehicles

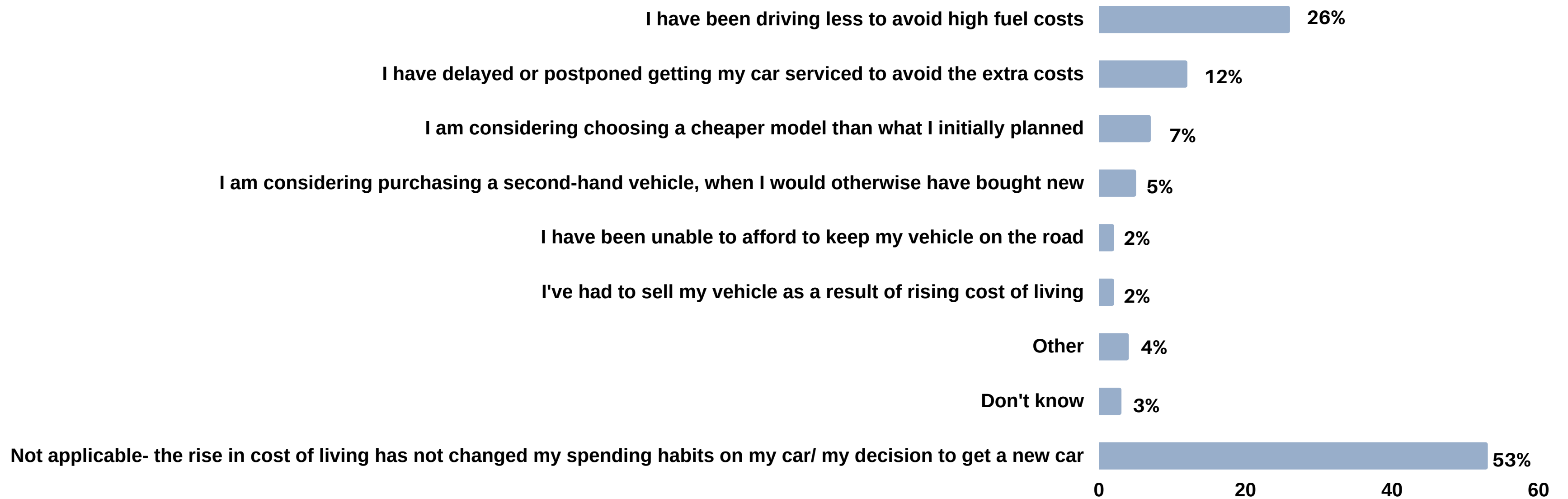
Q6 - Which ONE of the following would you trust the most for their knowledge and expertise on Electric Vehicles?



- 16% of respondents express a lack of trust in both franchise dealers and independent garages.
- Among those who trust a franchise dealership, 39% of males show a higher trust compared to 30% of females for franchise dealerships.

Over half of the UK license holders (53%), mentioned that the increase in the cost of living has not influenced their spending habits on their current car, or their choice to acquire a new one

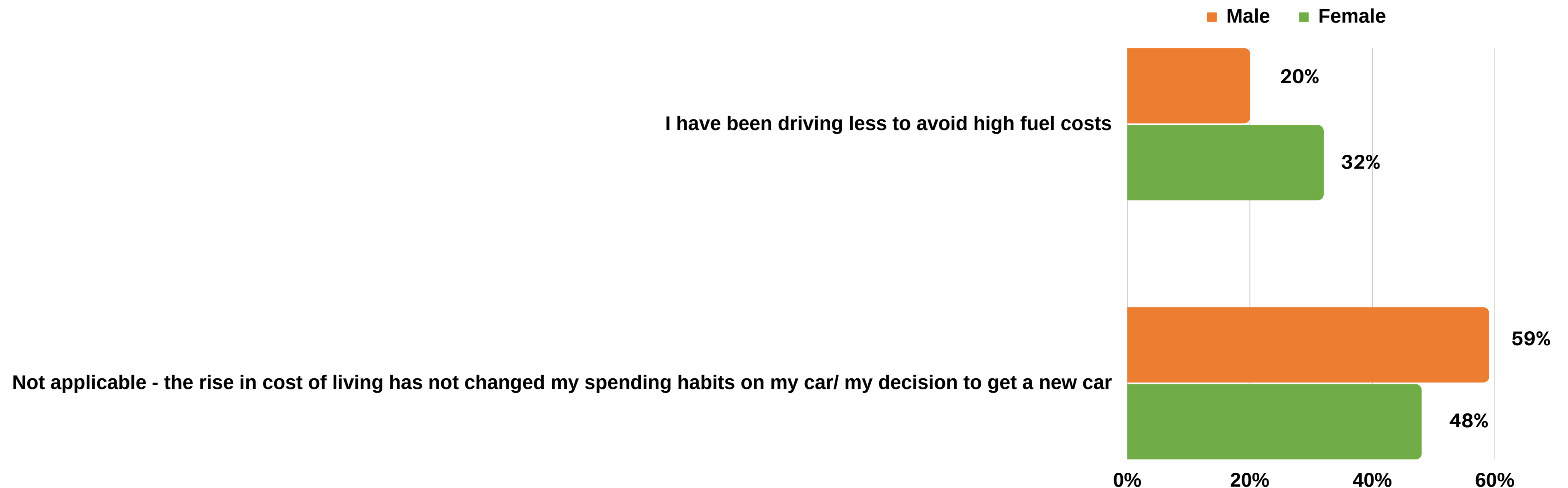
Q7 - In what way, if at all, has the ongoing rise in the cost of living changed your spending habits on your car/ decision to get a new car? (Please select all that apply)



- 26% of respondents have reduced their driving to mitigate the impact of high fuel costs.

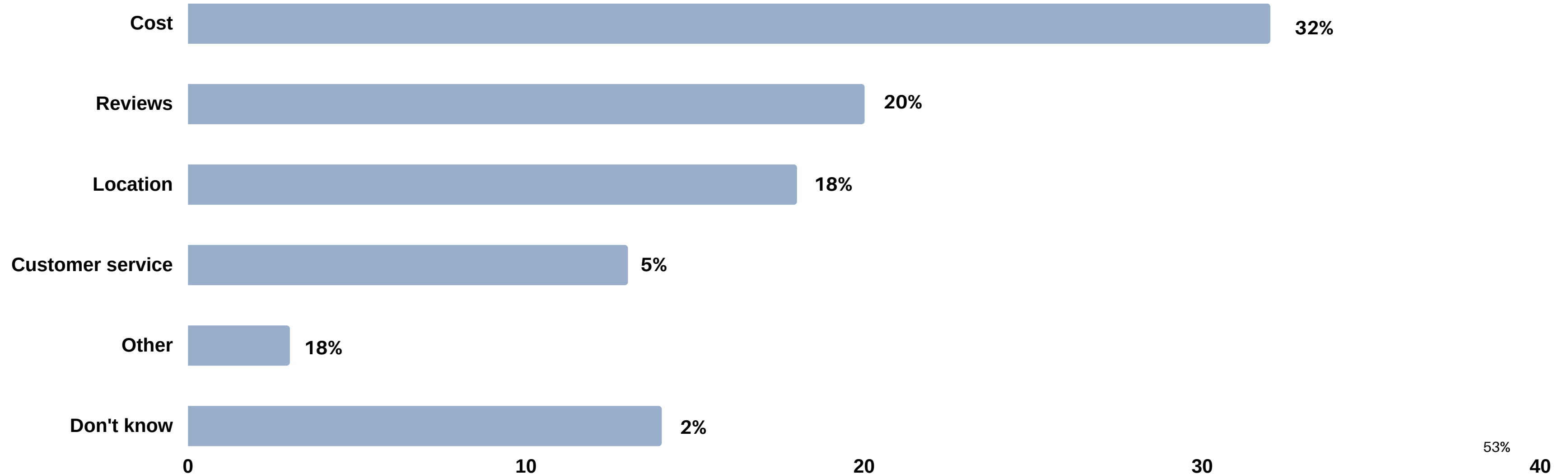
Women seem more likley to change their spending habits due to the cost-of-living crisis than men.

Q7 - In what way, if at all, has the ongoing rise in the cost of living changed your spending habits on your car/ decision to get a new car? (Gender breakdown)



32% of UK license holder emphasize that cost is the MOST important factor when searching online for a vehicle dealership

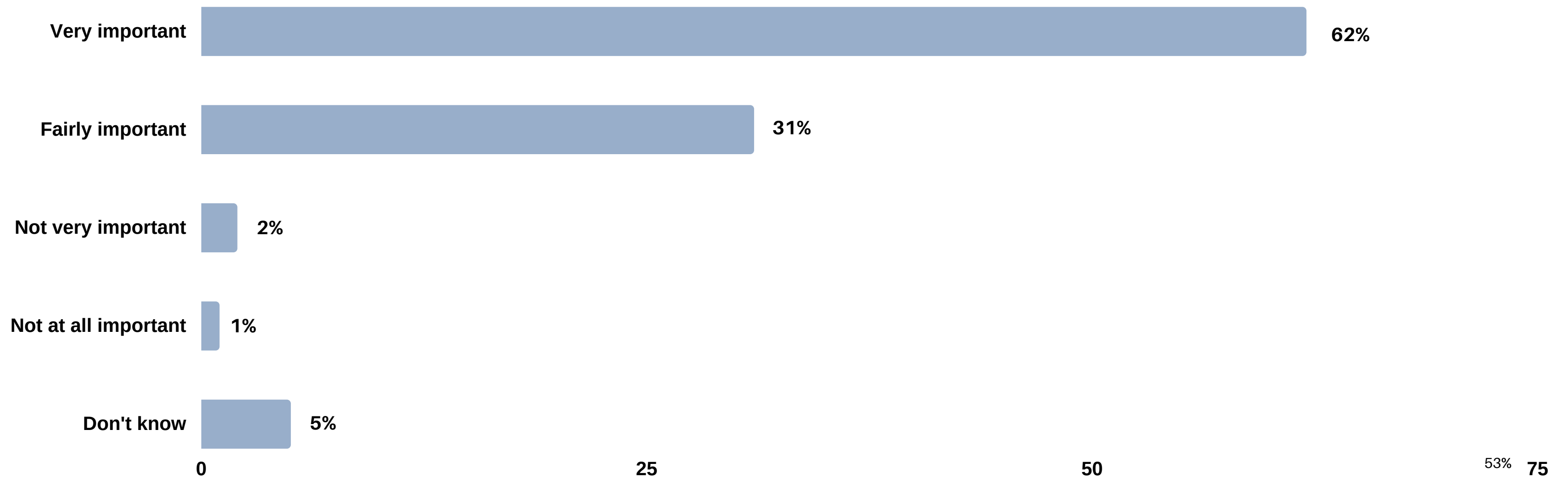
Q8 - Which ONE, if any, of the following is the MOST important thing for you when searching online for a vehicle dealer?



- For respondents, reviews (20%) and location (18%) are also critical factors when searching online for a vehicle dealer.

62% percent of all UK adults with a license believe that it is very important for them to explore various options to secure the best possible deal

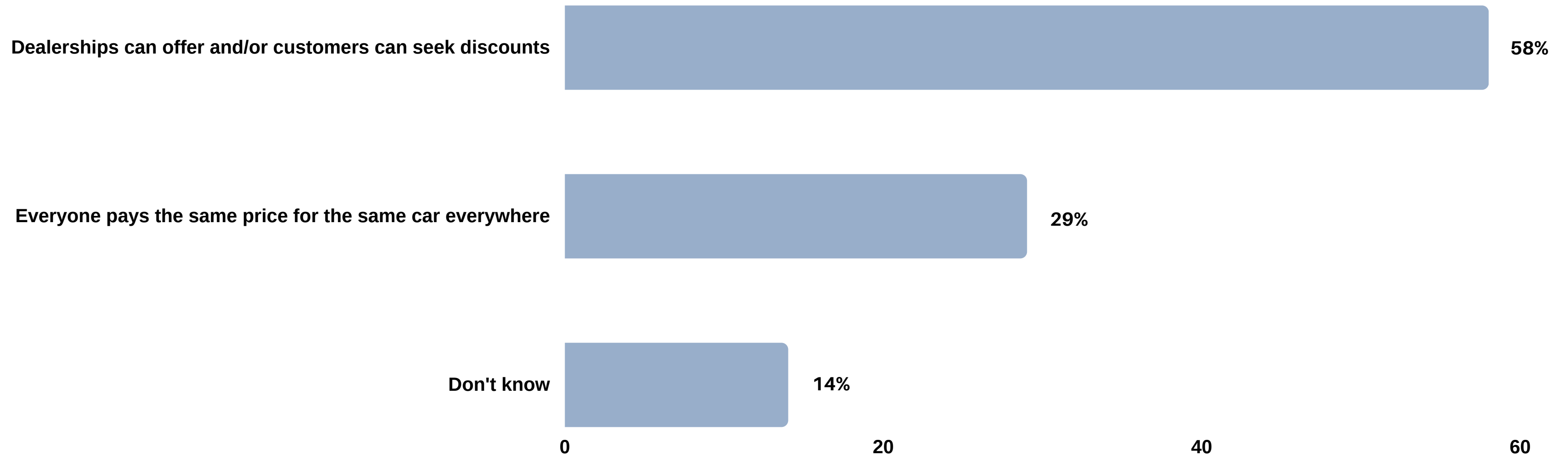
Q10 - How important, if at all, is it to explore various options to secure the best possible deal?



- Approximately 95% of both men and women agree that it is crucial for them to explore different options to secure the most favorable deal.

A significant majority (58%) of UK adults with driving licenses will prefer dealerships that can provide attractive offers

Q11 - *If you had to choose, which one of the following would you prefer?*



- Individuals aged 55+ exhibit a 60% preference for dealerships with attractive offers, exceeding the 50% inclination observed in the 25-34 age group.



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THANK YOU

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