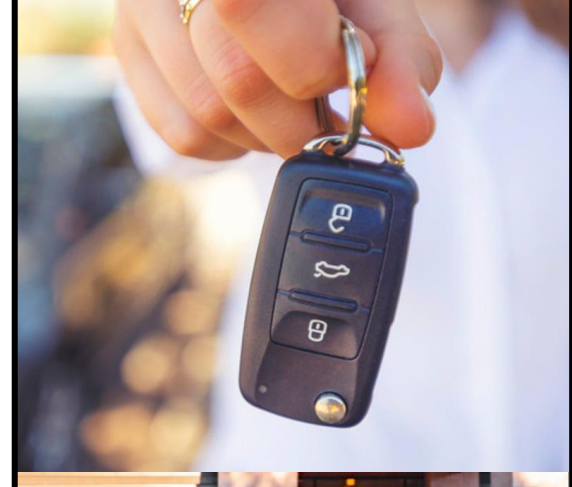
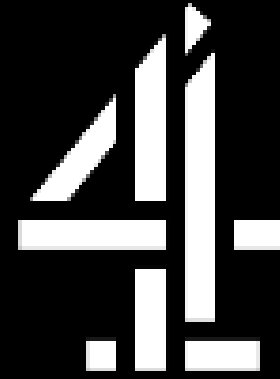




little black book



...of Cars

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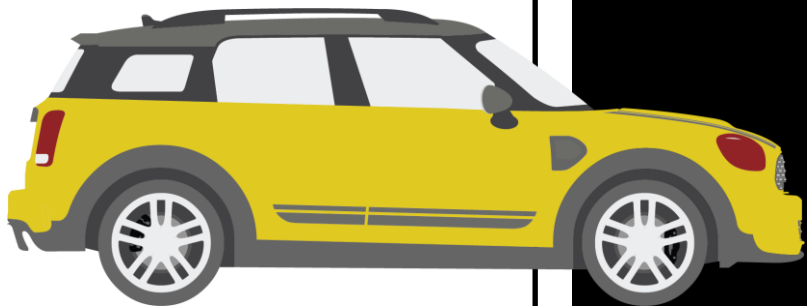
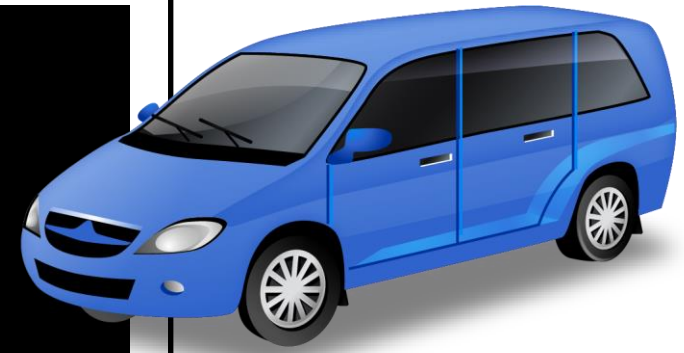
06

Our Channels



01

Methodology



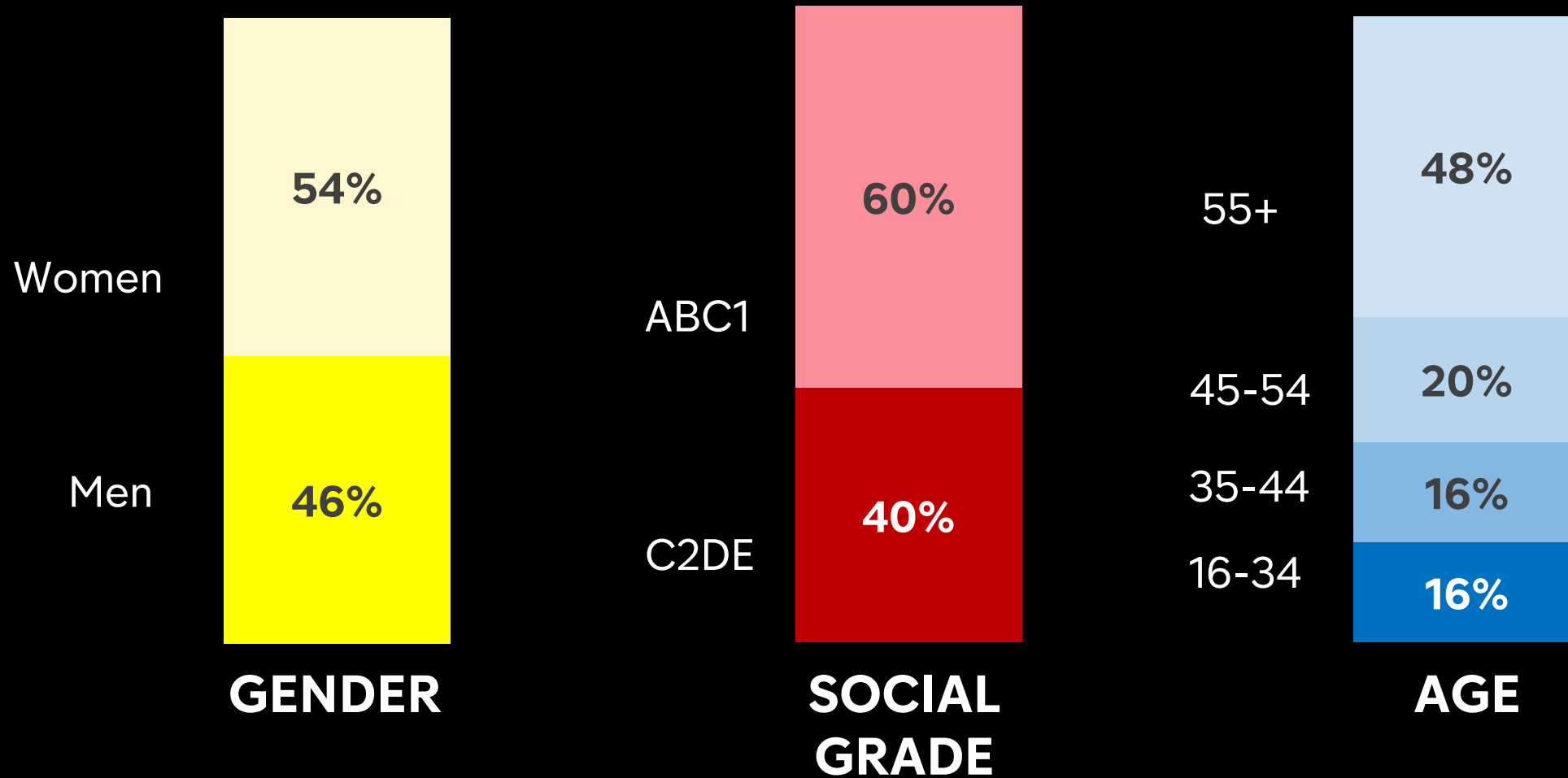
Methodology – what we did!

We sent a survey to our **Core4** community, which is made up of a subset of our All 4 registered viewers. In total **we collected 646 responses.**

Respondents were asked questions about their **priorities when buying a car**, how they would look to buy a new car in the future and a look into **growing trends** including **electric vehicles.**



Our sample skews slightly older, more upmarket and more female



*Our sample and been weighted to better reflect the Channel 4 viewer profile



02

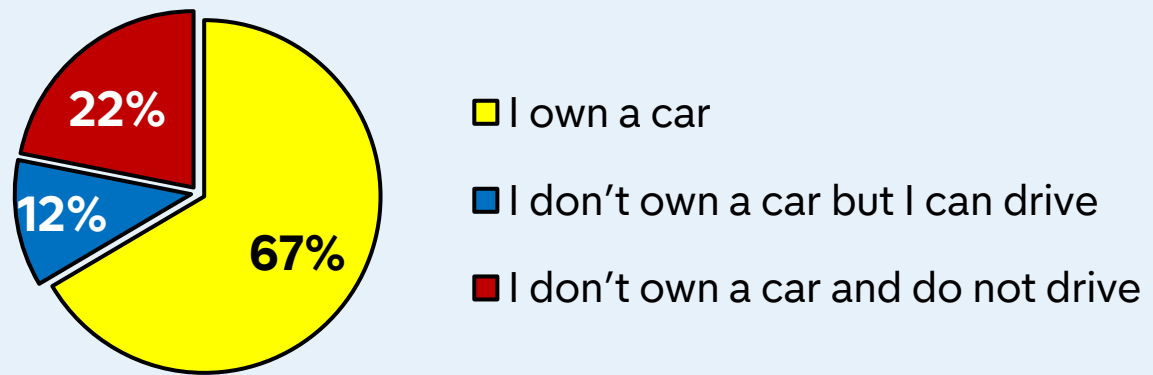
Current Car Ownership

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67% of our sample already own a car, those that don't drive are more likely to live in areas known for having strong public transport links

Which of the following best applies to you when it comes to driving/car ownership?



63% of those living in a **city** own a car



68% of those living in a **town, village or hamlet** own a car

Why don't you currently drive/have a car?

38% I don't feel I need to drive

I can't afford to 37%

29% Easier to walk/use public transport

Prefer to use public transport 28%

26% I am anxious about driving

The environmental impacts 21%

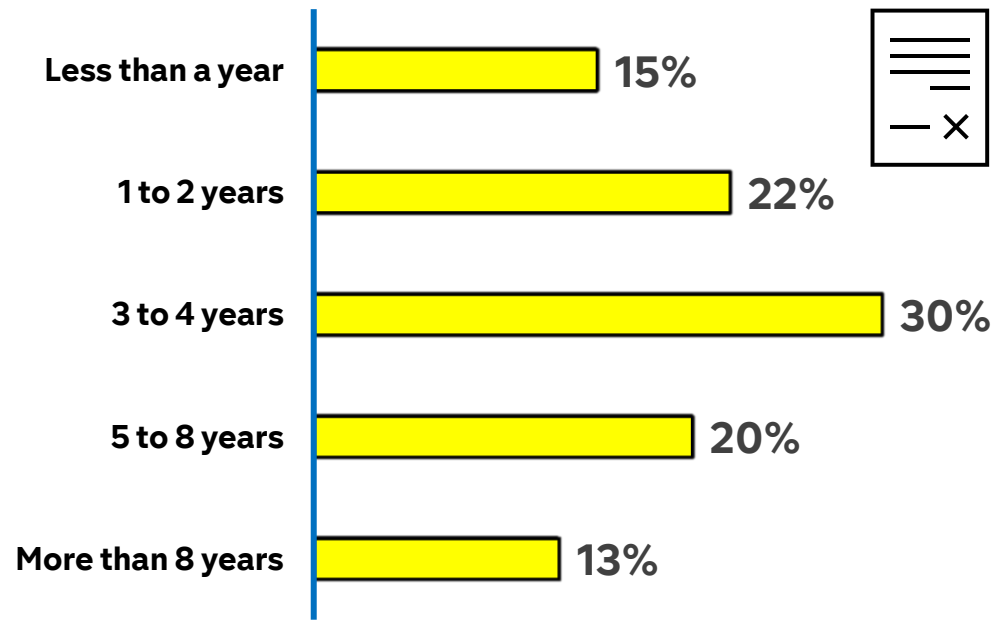


Source: Core4 Survey January 2022, n=646, Q = 'So first up - which of the following best applies to you when it comes to driving/car ownership?'

Two thirds of respondents have owned their car for at least three years, while 97% replace their car at least every three years.

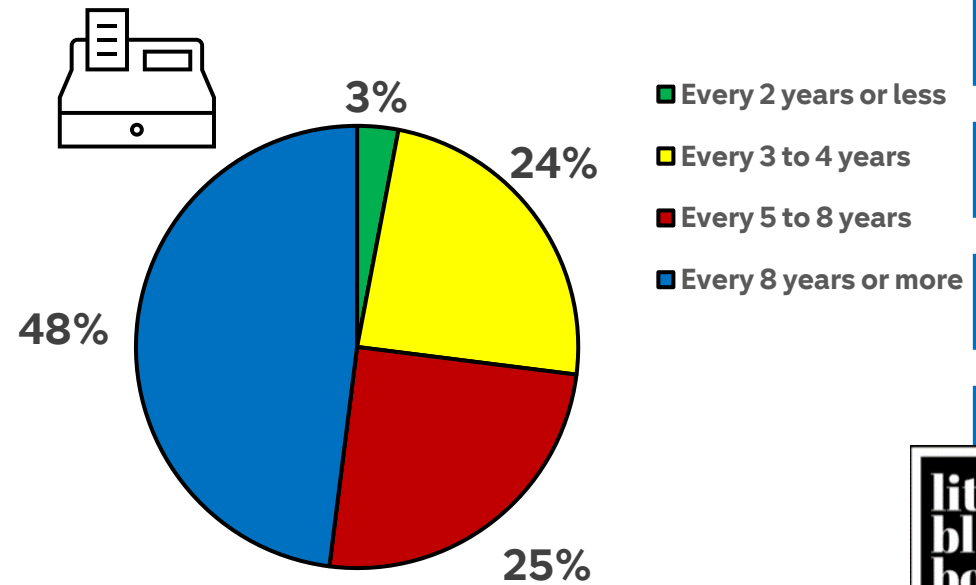
30% have owned their car for 3 to 4 years

How long have you owned your current car?



Only 3% replace their car every 2 years or less

How often do you replace your car?



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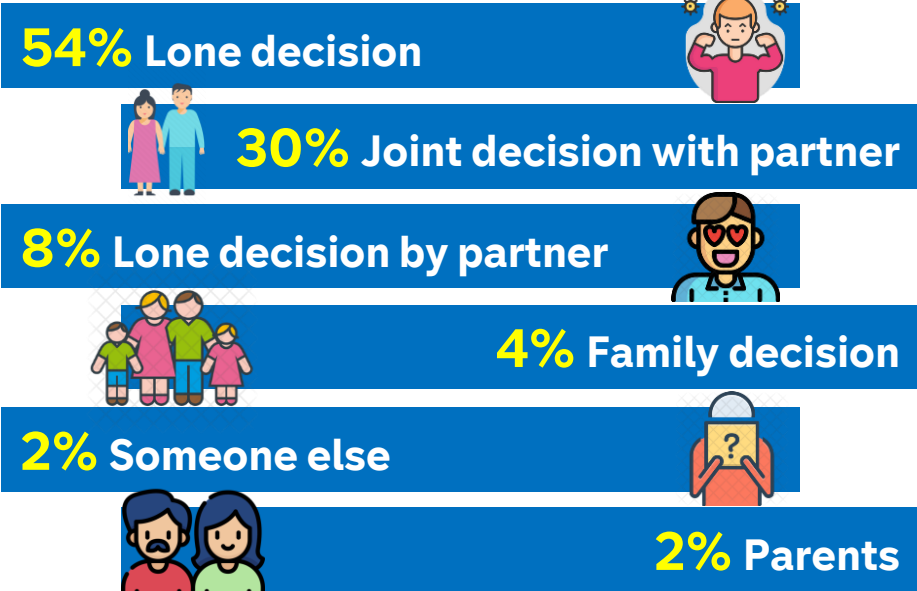


Decisions about final purchases are mostly made individually and in a short period of time...

People want to research and purchase cars quickly

- 🚗 **43%** of respondents took **less than two weeks** to complete the buying process of their last car.
- 🚗 **23%** took between two weeks and a month.
- 🚗 **32%** took between 1 month and a year. Only **2%** went **over 12 months** in their purchase.

Who chose the make/model of the car?



Source: Core4 Survey January 2012, n=646, Q="How long did it take for you to make your final purchasing decision? This includes: when you started researching buying your current car, all the way to finalising the purchase"

03

Future Car Purchasing Decisions



Price and reliability are the most important factors for our respondents when looking to buy a car

Imagining that you are looking to buy a new car, from the below list, select which are most important to you:

Top Criteria of Choice:

77% Price



73% Reliability

66% Fuel efficiency



55% Size

47% Mileage



46% Safety

41% Age of car



36% Brand

On average, the **oldest** car they would consider buying is **6 years old**

Due to covid production delays, **11%** are more likely to purchase a used car rather than new

Instore vs. Online

86% said they are a more likely to purchase a car instore

29% listed Ability to Test Drive as important to them

"I like to see what I am buying, and would want a test drive. You can talk things over properly with the dealership staff. More reliable financially, less possibility of being ripped off"

33% of respondents listed **Environmental impact** as important to them



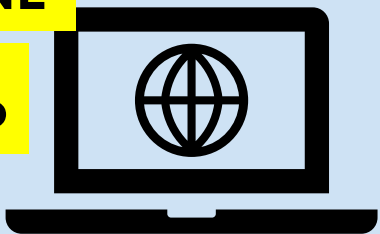
Source: Core4 Survey January 2022, n=646, Q = 'Imagining that you are looking to buy a new car, from the below list, select which are most important to you:', 'If you were to buy a used car, what is the oldest age you would consider?'

86% of respondents said they were more likely to buy their next car at a dealership in person rather than online

Are you more likely to purchase a car online or in-store?

ONLINE

14%



- More choice
- Less location/distance restrictions and delivery available
- Less pressure, can look at own speed
- Ability to compare prices

"I can choose from a much bigger variety and from all locations. I've bought online several times and the dealership deliver the car to my home"

IN-STORE

86%



- Test drive before purchase
- Physically see the car before purchase, able to check for any issues
- Support and knowledge of sales person
- Feels safer

"It's such a large expenditure, want to drive it, check comfort of the seats, ease of parking and similar"

Respondents would rather buy a new car instore. It is a big purchase that needs careful consideration, therefore the ability to physically see and drive the car before they decide is key.

57% agree "I like to speak to a professional when considering buying a new car"

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When it comes to payment options, 1 in 5 do not understand how car finance works and overall respondents are more likely to pay cash

Although respondents are more likely to pay cash, they understand the benefits associated with using a financing arrangement.

Providing financing options enables buyers to buy the car they really want!



22% agree "I wouldn't be able to purchase a car without finance options"

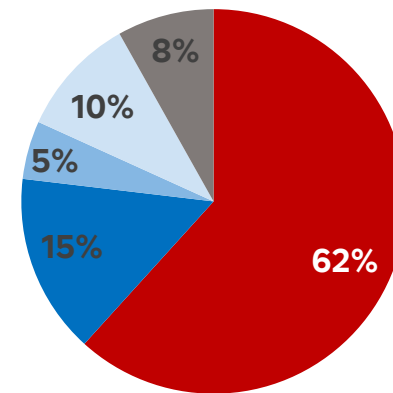


42% agree "Finance options mean I can buy a better car than I could afford outright"



43% agree "I compare interest rates when looking to finance a new car"

When it comes to buying your next car, which payment option are you most likely to use?



■ Cash – bought outright

■ Finance arranged through the dealer

■ Finance arranged from a bank

■ A leasing plan

■ Other (Please specify)

Finance

Buyers want their payment options to be clear:
85% agree "It's important that car dealerships are transparent about their financing options"

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When thinking about replacing their current car, respondents are most likely to part exchange or trade in

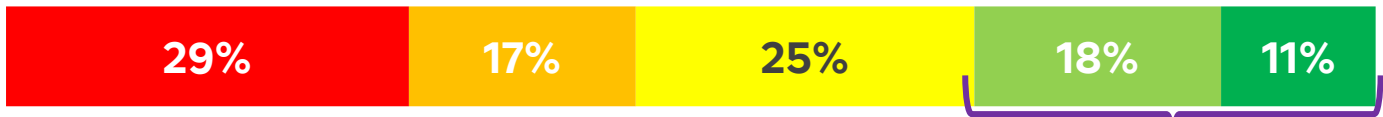
If you were to replace your current car, how likely/unlikely would you be to consider the below options:

Part exchange or trade-in:



Sell privately:

70% are likely to part exchange or trade-in



Sell via a car buying service:

29% are likely to sell privately



22% are likely to sell via a car buying service

Very unlikely Slightly unlikely Neutral Slightly likely Very likely

61% of respondents agree that buying a car is **stressful**, part exchange/trade in allows them to buy and sell in one place



Source: Core4 Survey January 2022, n=646, Q= 'If you were to replace your current car, how likely/unlikely would you be to consider the below options:'

The most popular brands amongst our respondents were Ford, Volkswagen and Toyota








When going to buy their current car, **70%** of respondents already had a particular brand in mind

Which car brand would you most likely consider in the future:



The most commonly mentioned brands were:

-  1. Ford **25%**
-  2. Volkswagen **19%**
-  3. Toyota **18%**
-  4. Audi **15%**
-  5. BMW **11%**

For others, brand is not that important:

"I buy what is available at the time for the price I can afford I don't care what brand it is as long as it's reliable and good value for money"

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04

Cars and the Media



Nearly 1 in 4 adults rated TV adverts and TV products as important sources of car inspiration

23% of respondents rated TV adverts as an important source of inspiration

23% rated TV programmes as important

Why TV inspires Car purchases:



LATEST PRODUCTS

Helps viewers keep up with the latest models and features



BRAND IDENTITY

Respondents said they understand what the car and brand represent better



INFORMATIVE

Provide details they'd likely not be aware of otherwise

Stand Out Car Ads!

What is your favourite car advert, or perhaps one that particularly stood out to you?

Renault Clio: Papa and Nicole

Ran throughout the 90's, respondents still recall this iconic campaign!



Generally, people recalled ads that features specific music or talent.

35% agreed that they like to see the latest car models advertised on TV

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book



TV is the perfect place for car brands to spread awareness of new models!

39% of respondents said that they notice new car models advertised on TV

And television helps to improve brand image



34% agree "Car brands that advertise on TV tend to be **more luxurious**"



31% agree "Car brands that advertise on TV tend to be **high quality**"



28% agree "Car brands that advertise on TV tend to be **innovative**"



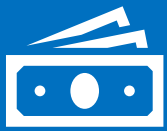
In the future, viewers would generally like to see more information about the cars featured in adverts

What do viewers want to see in car adverts:



RELATABILITY

Viewers are keen to see ads feature every day scenarios and locations



COSTS AND SPECIFICATIONS

Respondents are interested in knowing price of the car upfront



DIVERSITY

They want to see how accessible a car is to families and those with disabilities



ECO CREDENTIALS

Increasingly, viewers want to know more about the environmental impact of vehicles

*"Fuel efficiency/ electric facility (and paying or funding home electric point) - **what technology is included** - 0% finance option. If all electric how far you get on one charge."*

*"Used by someone with **disability** being able to use the cars: getting in and out, ease of using the load space. Safety features, **real life driving information.**"*

*"I would like to see them **true to life** doing the school run, then shopping, then taking the kids to after school events ect. People want a car that is **practical** and helps everyone survive day to day living. There is a place for luxury aspirational cars but many people need a car to enable them to live day to day"*

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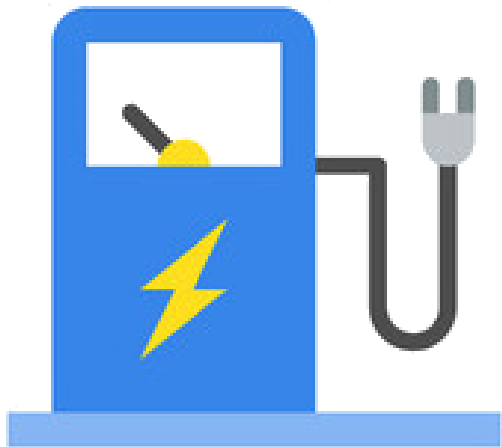


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Cars of the Future

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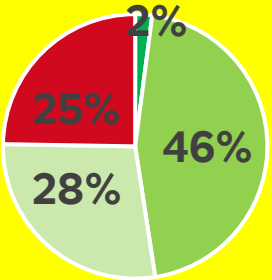
Electric vehicles are becoming more attractive to buyers that are hoping to lower running costs and be more sustainable

48% of respondents definitely would consider buying an electric car



Would you consider buying an electric vehicle for your next car?

- Yes - my current car is electric
- Yes - I would consider it
- Maybe – I would need to do some more research
- No – I wouldn't consider it



Reasons for considering:

71% Lower running costs



Air-quality improvements 60%

48% Sustainability concerns



Government incentives 43%

40% Insensitivity to fuel prices



Increasing number of charge stations 34%



Source: Core4 Survey January 2022, n=646, Q = 'Would you consider buying an electric vehicle for your next car?', 'We'd like to hear why you would buy an electric vehicle. Please select all that apply'

For respondents unsure about EV's, their main concerns relate to their limited ability to charge both at home and on the go

Reasons for not considering:

77% Lack of charging infrastructure



Cost/price premium 76%



67% Range restrictions



Time required to charge 57%



50% Unsure if I could charge it at home/don't have the space



Reliability concerns 35%



How important to you are the following when buying a car in the future?

Local manufacturing



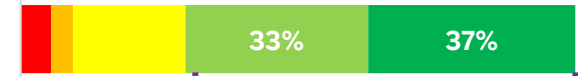
38% think local manufacturing is important

Sustainable materials



64% think sustainable materials are important

Low emissions manufacturing



70% think low emissions manufacturing is important

Although not all respondents are sold on the idea of an electric car just yet, they are conscious of eco practices. **70%** believe low emissions manufacturing is an important part of their future car criteria and **64%** value sustainable materials.

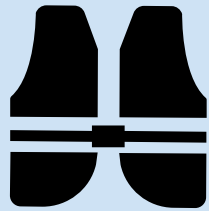
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1 in 4 respondents would buy an Autonomous 'Self Driving' Vehicle if price wasn't a factor, however overall people are concerned about their safety

AV Concerns:

SAFETY



- **55%** agree that self-driving cars seem unsafe
- **50%** agree that they do not think the technology is safer than their own driving

KNOWLEDGE



- **53%** do not know the difference between Autonomous Vehicles (AVs) and Advanced Driver – Assistance Systems (ADAS)
- **40%** do not know how AVs work

Although many are excited and intrigued by the prospect of a 'self-driving' car, generally they are worried about how safe self-driving cars are and struggle to understand how they actually work.

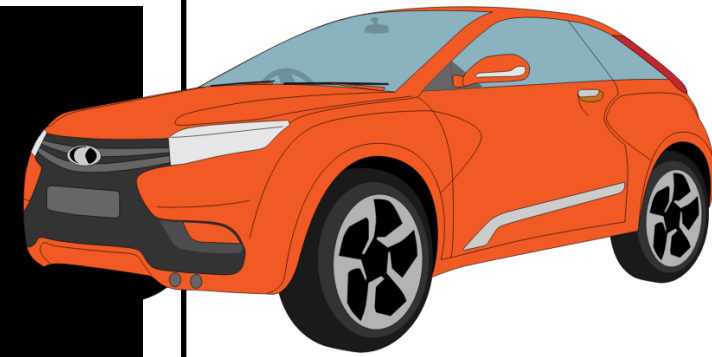
84% agree "There needs to be clear government approval of self-driving cars"

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06

Our Channels



PURCHASING HABITS

26%



Replace their car at least every 4 years

44%



Make car decision in less than 2 weeks

SOURCES OF INSPIRATION

25%



TV adverts are important

24%



TV programmes are important

CAR FINANCE

60%



Plan to buy a car with cash

33%



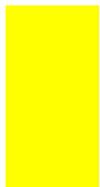
Plan to buy via finance plan

60%



Buying a car is stressful

41%



I notice new car models advertised on TV

37%



I like seeing the latest car models advertised on TV

35%



Car brands that advertise on TV tend to be more luxurious

32%



Car brands that advertise on TV tend to be high quality

30%



Car brands that advertise on TV tend to be innovative

17%



I like to be able to change my car frequently



PURCHASING HABITS

18%



Replace their car at least every 4 years

47%



Make car decision in less than 2 weeks

SOURCES OF INSPIRATION

21%



TV adverts are important

23%



TV programmes are important

CAR FINANCE

65%



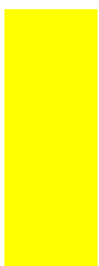
Plan to buy a car with cash

29%



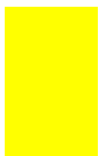
Plan to buy via finance plan

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I like to be able to change my car frequently

little black book



PURCHASING HABITS

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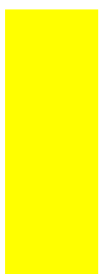
Plan to buy a car with cash

29%



Plan to buy via finance plan

56%



Buying a car is stressful

42%



I like seeing the latest car models advertised on TV

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Car brands that advertise on TV tend to be high quality

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Car brands that advertise on TV tend to be innovative

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I like to be able to change my car frequently

little black book



PURCHASING HABITS

29%



Replace their car at least every 4 years

46%



Make car decision in less than 2 weeks

SOURCES OF INSPIRATION

22%



TV adverts are important

26%



TV programmes are important

CAR FINANCE

64%



Plan to buy a car with cash

28%



Plan to buy via finance plan

58%



Buying a car is stressful

42%



I notice new car models advertised on TV

41%



I like seeing the latest car models advertised on TV

32%



Car brands that advertise on TV tend to be more luxurious

32%



Car brands that advertise on TV tend to be innovative

28%



Car brands that advertise on TV tend to be high quality

19%



I like to be able to change my car frequently



ABC1 Adults

PURCHASING HABITS

26%



Replace their car at least every 4 years

42%



Make car decision in less than 2 weeks

SOURCES OF INSPIRATION

21%



TV adverts are important

22%



TV programmes are important

CAR FINANCE

60%



Plan to buy a car with cash

33%



Plan to buy via finance plan

63%



Buying a car is stressful

42%



I notice new car models advertised on TV

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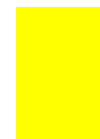
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