



Easy To Do, But Would You?

Drivers & Fuel Economy in 2007

A study to understand what drivers in 11 countries are thinking, feeling & doing about their fuel consumption

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Easy To Do, But Would You? Drivers and Fuel Economy in 2007

Introduction

This research report was commissioned to dig deep and discover whether motorists today are thinking about saving fuel while they drive, and whether awareness is translating into action.

How do we view fuel and driving since climate change and environmental issues have risen in political and public consciousness? Have we altered the way we drive to adapt? If we have, why have we? And if we haven't, why haven't we? Are we thinking about the fuel we use in this context, or is price at the heart of everything we choose to do? How do we compare with our neighbours in other countries?

Cars and driving mean different things to different people. And driving serves different purposes for different people. This research is intended to reveal patterns and contrasts, to identify the people who are actively trying to affect their fuel consumption already. We also set out to identify those who are more removed from Fuel Economy. Do they want to be reached? Can we reach them? What would we have to do if we wanted to?

Armed with an understanding of some of these factors, and looking at how drivers' attitudes and behaviour contrast by country, collectively we can consider what can be done. Improving Fuel Economy is one way to help reduce what we spend each month on fuel and, also, to help us use the natural resources we have, in a responsible and sustainable way.

Objectives & methodology

This report quantifies car and/or van drivers' perceptions and behaviour around Fuel Economy. It reflects results across the 11 countries surveyed, spanning Europe, Asia Pacific and Latin America.

Meaningful differences between subgroups are outlined at the beginning of the report and are then highlighted throughout. Demographics of those surveyed are at the end of the report.

The Research Objectives were:

- Assess consumers' awareness of Fuel Economy and the potential to affect behaviour
- Evaluate different driving patterns and how these impact on attitudes
- Identify who is 'Fuel Economy Active' and 'Fuel Economy Passive'
- Evaluate 'triggers' that could shift respondents' opinions and behaviour
- Assess who motorists would trust when seeking advice on Fuel Economy

Methodology

This study was conducted in April 2007 by StrategyOne Limited, an independent market research consultancy, in the following countries:

- Australia
- Chile
- Denmark
- Germany
- Hong Kong
- Malaysia
- Netherlands
- New Zealand
- Philippines
- Singapore
- UK

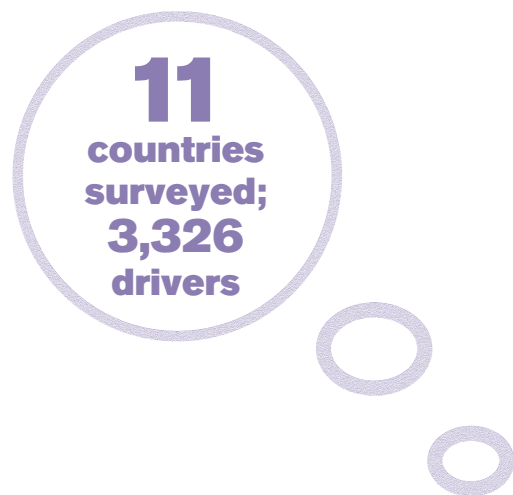
All interviews were conducted using either telephone or face-to-face interviewing. 3,326 interviews were completed, with approximately 300 in each country, among private motorists.

The survey sample is representative of the private motorist population and consisted of drivers of either passenger cars or vans, who regularly drive these for leisure purposes or for a combination of leisure and business purposes. Respondents were users of non-premium unleaded or diesel fuel and had to be able to provide an estimate of their annual mileage.

Margin of error

The margin of error (MoE) on a sample of 3,300 is plus or minus 1.7 percentage points at the 95 percent level of confidence. With a sample of 300 respondents, the MoE is +/-5.7 percentage points.

Example: A margin of error of plus or minus 1.7 percentage points means that there is a 95% chance that the responses of the target population as a whole would fall somewhere between 1.7% more or 1.7% less than the responses of the sample (3.4% spread).



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Overview – What we discovered

The price of fuel really does dominate. We think about the mileage a car will give us when we buy it, and then we think about our back pockets when we fill up, but after that we tend to ‘take the back seat’. In fact, 4 in 10 of us have never checked our fuel consumption per mile/litre, and a clear majority (6 in 10) have never tried to improve the Fuel Economy of our cars. Only 1 in 3 of us can be called what we describe as ‘Fuel Economy Active’.

Critically, if you ever check your mileage, you are much more likely to think you have control over the amount of fuel you use to get from ‘A to B’. And if you think you have control over your fuel consumption, you probably try to do a couple of things to improve your fuel economy, but not much more than that. From a list of nearly fifteen activities, very few options available get onto our radar screens without us being prompted. Do sex and age matter? The answer there is yes: men feel they have more control than women and older drivers are more likely to be actively fuel economical.

So, if we aren’t doing much to improve our Fuel Economy, is it because we aren’t interested in saving fuel or because we don’t care about money or the environment? Or, is it because we don’t enjoy driving or think much about our cars? The answer to all these questions seems clearly to be “no”:

- Over 9 in 10 of us value the feeling of freedom driving gives us
- Nearly all of us care about how much we are spending
- Driving isn’t ‘stressing us out’ too much
- Most of us will sign up to activities happily, *if* we know what our options are
- When offered a list of things we could be doing, there is a huge spike in interest

What, then, would it take for us to improve our Fuel Economy?

- We need to see it saving us money
- Some, largely West Europeans / Australasians, need to see it helps the environment

- We need to see simple solutions that don’t take too much effort and are free
- Ideally, technology and products would do it for us
- In summary, we need proof; we need to be convinced

But who to ask? Who would we trust for information, advice and guidance?

- We want people who are near our car day to day to advise us
- We would trust our mechanic over our mother
- And an automobile association over our friends
- And, if they do offer advice, it seems we are willing to listen

Other Key Points

- Half of drivers don’t feel more conscious about Fuel Economy now than they were 12 months ago
- Over half of people surveyed have not changed the way they drive in light of increased fuel prices, while four in ten have changed their driving habits and have cut down on unnecessary driving or are now more aware of speed
- Only 9% of drivers mentioned fuel spontaneously as a Fuel Economy factor. Whereas when prompted over 50% say they would choose a fuel that can improve Fuel Economy
- Not everyone feels the same towards Fuel Economy. Some drivers are more enthusiastic, while others are more sceptical. For instance, drivers in Australia, New Zealand, and the UK are more open than their counterparts in Malaysia, Singapore and Chile to practical ideas on Fuel Economy

What next?

If drivers start checking mileage frequently enough, this research paper indicates that many of us could quickly become conscious, interested, aware of our options and then, ultimately, ‘Fuel Economy Active’.

That’s a quick, general overview. But please look at the findings that follow to see how the general trends relate to your country’s drivers. You will find charts that compare countries and insights. Above all, you will see that where you live and where you drive matter a great deal.

Overall findings

Frequency of driving and some of the purposes that cars are used for have an effect on Fuel Economy consciousness

The profile of motorists' behaviour for this survey is that they drive on average 5 days a week, refuel when the tank is almost empty or a quarter full and they mainly use their car for shopping and/or commuting. Refuelling doesn't have an effect on Fuel Economy consciousness, but the frequency of driving and the purpose for which a car is used, can be influential factors.

- Seven in ten of motorists surveyed drive at least 5 days a week (fig.2, page 10). Drivers claiming to be more Fuel Economy conscious drive with equal frequency in a typical week as other drivers.
- Singapore, Malaysia and New Zealand motorists drive more than in any other countries surveyed (fig.3, page 11).
- Most drivers refuel when the tank is almost empty or about quarter full (fig.4&5, page 11&12). However, refuelling habits are not a key determiner in making drivers more or less Fuel Economy conscious.
- Overall, shopping is the most popular car-related activity with more than two-thirds of drivers globally using their cars to get the shopping. Commuting (to work or place of study, 55%) is the other main reason for taking out the car.
- Malaysia, Singapore, Hong Kong and New Zealand are countries where there are most car-commuter drivers. However, drivers from these countries [except New Zealand], tend to do less on average to get more mileage out of the fuel they put in their car (fig.18, page 23).
- Not surprisingly, drivers who use their cars for commuting or the school run are heavier car users in that they have higher annual mileage and drive more days per week. However, many drivers who use their car for these two purposes may be less open to changing to a more Fuel Economy conscious approach.

The less drivers care about the image their car creates, the more they are likely to be Fuel Economy Enthusiasts

Cars represent functionality, status or freedom to get around. The attitudes to driving and cars do have an effect on a driver's Fuel Economy consciousness.

- To those surveyed, the car can represent: functionality, status, or freedom (fig.8, page 16). Some signs of Fuel Economy consciousness are nascent in the attitudes drivers hold, with a functional [rather than emotional] approach to the car (seeing it as mainly a mode of transport) being a positive sign of this, especially amongst those who are 55+ and/or low mileage drivers.
- The less drivers care about the image and impression their car creates, the more likely they are to be Fuel Economy Enthusiasts. Functional, less extravagant drivers are mainly in the European countries surveyed as well as Australia and New Zealand, regions where there is higher ownership of cars per household and cars are less expensive relative to the average household income.

Checking the car's fuel performance is the first step towards being Fuel Economy Active

Checking the car's fuel performance is the first step in increasing Fuel Economy awareness and control. Those who don't check their mpg/kmpl are not likely to actively improve the fuel performance of their car. Those who do check, may or may not actively try to improve the fuel performance of their car.

The practice of checking the car's fuel performance is a differentiator in Fuel Economy awareness and so those who consider this early on are often more conscious about their usage (fig.11, page 18). Most of the drivers said they have checked the mpg/kmpl they can get from their car. The practice thus represents a first step in increasing awareness and control.

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- Those who do check usually drive diesel cars, estate or station wagon models and do more than 20,000km per year.
- Once people are in possession of their car, however, many factors influence whether they monitor fuel usage rates and one of these is the economic conditions in which drivers find themselves and the choices available to them, for example, whether they were dissatisfied with the fuel consumption rate of their vehicle.

Over half of all drivers surveyed feel they have a lot or some control over fuel consumption

But a large proportion still don't feel they have much or any control. Perception of control over fuel consumption varies widely by country.

- Nearly four in ten drivers feel they have little or no control (fig.13, page 18).
- Germany and the Philippines are countries where most drivers feel they have control over the fuel consumption of their car, with respectively 77% and 80% saying they have a lot or some control (fig.14, page 19).
- Hong Kong, Malaysia and Singapore are countries where drivers feel least in control.
- People feel more aware of fuel consumption when they drive long journeys, are buying fuel or when the gauge shows that the tank is nearly empty (fig.16, page 20).

Drivers display very low awareness of what they could do to improve Fuel Economy

Globally, drivers who have actively tried to improve the fuel performance of their car are in the minority. There is a general lack of knowledge as to what can be done to improve Fuel Economy.

- Control over Fuel Economy could be much better among drivers globally; most users are not yet aware of the improvements they could make, particularly in the Asian countries surveyed.
- Globally, drivers who are Fuel Economy Active i.e. those who have already done at least one thing to improve the Fuel Economy of their car, are in the minority (37% of the private motorist population surveyed) (fig.17, page 22).
- Even among this advanced group of Fuel Economy Actives there is insufficient awareness and practice of the activities which could promote better Fuel Economy.
- Most can only think of only two activities, from a potential list of around 15.
- The main activity is driving sensibly which is only mentioned by 51% of the Fuel Economy Active population (fig.17, page 22).

Cost saving and availability of fuel that can improve Fuel Economy would persuade drivers to become more Fuel Economy Active

Drivers appear to be easily persuaded to become more active in improving the fuel performance of their car, especially those who are already doing something.

Providing proof that improving their Fuel Economy will save money and availability of fuel that can help deliver increased mileage can address this.

- Over two-thirds are interested in a fuel that gives them more miles per gallon / km per litre.
- Two-thirds of drivers would need to know they were making savings in any pursuit of Fuel Economy (fig.23, page 28).
- Not surprisingly, Fuel Economy Actives are keen to take up new activities. For other groups, whether their beliefs and attitudes - and the surrounding environment - will enable them to take up action in the future will depend on:
 - Having a higher level of information about the issue.
 - Greater incentive to do something; the latter more often than not involving saving money.
- There remains a great deal of scope for improving Fuel Economy consciousness among drivers generally, though behaviour change would need to be step by step. There is also a belief among motorists that not all the efforts should come from drivers.
- Drivers in Australia, New Zealand and the UK are the most easily persuaded to become more active in improving the Fuel Economy of their car.

The price of fuel has an impact on Fuel Economy consciousness

Cost has a major part to play when considering how to get drivers to be more active in improving the Fuel Economy of their cars.

- Drivers have become acutely aware of the cost of the fuel they put in their cars. Cost is therefore a significant factor globally when considering how to increase the number of Fuel Economy Actives. Even though many drivers are conscious of the higher price of their fuel, they are not necessarily changing their driving behaviour as a result. One reason suggested is that in many countries fuel pricing has not yet reached the tipping point at which behaviour is likely to change.

- Four in ten drivers globally have changed the way they drive due to a rise in fuel prices (fig.29, page 32).
- The Philippines is the country where fuel price increase had most impact on driving behaviour. Whereas in the Netherlands, Hong Kong, Denmark and the UK more than three-quarters of drivers say they have not changed the way they drive (fig.30, page 33).

Expertise and proximity are key to communicating about Fuel Economy

Drivers are more open to information about improving their Fuel Economy when they are refuelling and from a wide variety of experts or people with practical knowledge of the subject.

- Drivers claim to be more conscious of their fuel consumption on long journeys and when they are filling up with fuel. Hence, there is considerable potential for delivering messages about Fuel Economy to drivers when filling up with fuel (fig.16, page 20).
- From work colleagues to mechanics, there is a myriad of sources which drivers would trust in finding out more about Fuel Economy. Nevertheless, most drivers globally (six in ten) would turn to their local mechanic who services their car for advice on Fuel Economy.
- UK, Australia and New Zealand drivers tend more than others to trust their local mechanic.
- In Malaysia and Singapore, drivers would primarily get advice from friends and family.
- By the same token, those who are conscious of their fuel usage would be much more likely to trust experts or people with knowledge of the issues, rather than simply people they know.

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59% of motorists are Fuel Economy Sceptical, 41% are Fuel Economy Enthusiasts

A cluster analysis was carried out on each country, using data from every question. Cluster analysis is the classification of data into different groups, or more precisely, the partitioning of a data set into subsets (clusters), so that the data in each subset (ideally) share some common trait – in this case proximity according to a defined distance measure. Respondents should fall into one particular cluster (country table in the appendix).

The number of clusters which formed is not predetermined. They form naturally. In this case, there were two distinct clusters:

- Cluster 1 – Fuel Economy Sceptical
- Cluster 2 – Fuel Economy Enthusiasts

**N.B. this report refers elsewhere to Fuel Economy Actives / Passives. That categorisation differs from the categorisation of 'Sceptical' and 'Enthusiasts', described beneath. One example of the difference is that 'Actives' are doing something now, whereas 'Enthusiasts' may not yet be active.

Cluster 1 (59% of total) Fuel Economy Sceptical

Who is Fuel Economy Sceptical?

- Male rather than female.
- Younger drivers <35 years.
- Would drive a sport car rather than a saloon.
- Fuel Economy Sceptical are more numerous in the Philippines, Malaysia, Hong Kong, Singapore, Chile, and the Netherlands than in any other countries surveyed.

What type of driver is Fuel Economy Sceptical?

- Tend to drive substantially over the year.
- Would consider the impression a car makes, more than its functions.
- Would consider the mileage a car will give before purchasing but once they have the car do little to maximize fuel efficiency.

How does a Fuel Economy Sceptical driver feel about Fuel Economy?

- Not always convinced about improving Fuel Economy, even from trusted sources (not attentive).
- Not influenced by factors such as fuel shortage or availability of more environmentally friendly fuel.
- About half willing to be more 'fuel economic' if it means getting more mileage or saving money.
- Overall, less aware of Fuel Economy.
- Has a short term vision, is less environmentally aware and less frugal.

Cluster 2 (41% of total) Fuel Economy Enthusiasts

Who are the Fuel Economy Enthusiasts?

- Even male/female.
- Tend to be older (more 45+).
- Care less about the looks of the car and more about its functions.
- Fuel Economy Enthusiasts are more numerous in Australia, New Zealand, Germany, UK, and Denmark.

What type of driver is a Fuel Economy Enthusiast?

- Tend to have a lower annual mileage.
- Would think about mileage before purchasing a car.

How does a Fuel Economy Enthusiast feel about Fuel Economy?

- Tend to undertake initiatives to get more mileage from the car.
- Has a more long term vision, is more environmentally aware and frugal.
- Open to others' views and willing to improve Fuel Economy.

Detailed findings



Section 1

Background: How people drive

1.1 Number of days driven per week

Across the countries covered by the survey, the number of days people drive in a typical week is, on average, between 5 and 6 days (fig.1).

Nearly half of all drivers are everyday road users, driving on a daily basis (47%).

- Not surprisingly, this rises to two-thirds in those who are clocking up >20,000 km in a year. This suggests that for the majority with high annual mileage, it is a result of driving frequently, as opposed to driving less often but longer distances. Daily drivers are also more likely than others to refuel more often than once per week.
- 45-54 year olds are most likely to drive every day.
- Those with people carriers (53%) or convertibles (51%) are more likely to be frequent drivers than those in small cars (38% using the car everyday).

A further quarter drive at least 5 to 6 out of 7 days.

When we look at these two groups combined – driving at least 5 days per week – we find that:

- Drivers of diesel cars are also more likely to drive 5+ days in an average week (means: diesel 5.64; petrol 5.37 days per week driven) (fig.2).

The remaining 30% of motorists drive their cars on a less frequent basis, that is, up to a maximum of 4 days out of every 7 days.

Interestingly, those claiming to be Fuel Economy Active (i.e. actively doing something to improve fuel consumption) are no more or less likely to be frequent car users.

Looking at the geographical patterns (fig.3), Singapore, Malaysia and New Zealand record the highest driving frequency – closer to 6 days a week on average. Indeed, more than 7 in 10 Singaporeans are driving on a daily basis, much more than in any other country.

Also heavier car users than average are drivers in Australia and Chile.

In the UK and Netherlands, on the other hand, a sizeable minority of drivers tend to use the car only once or twice a week (19%, 17% respectively compared to 10% across the total).

Number of days driven per week

Q1: Thinking about an average week, how many days a week would you drive?

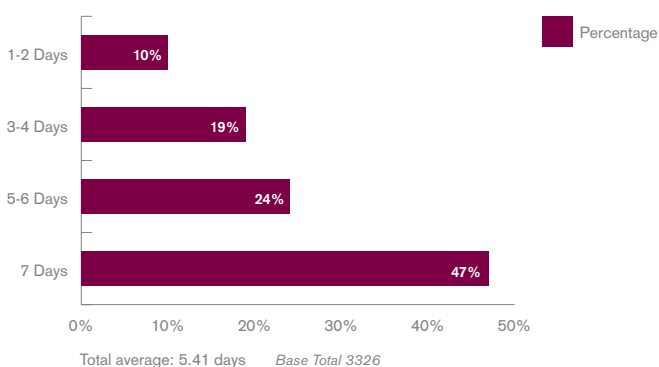


Fig.1

Number of days driven per week – Petrol vs. Diesel

Q1: Thinking about an average week, how many days a week would you drive?

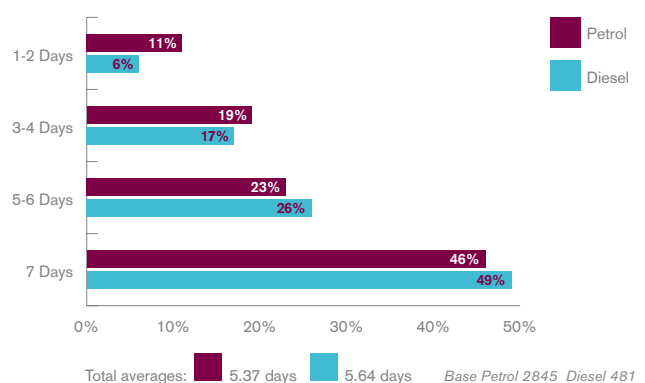


Fig.2

Number of days driven per week – by country

Q1: Thinking about an average week, how many days a week would you drive?

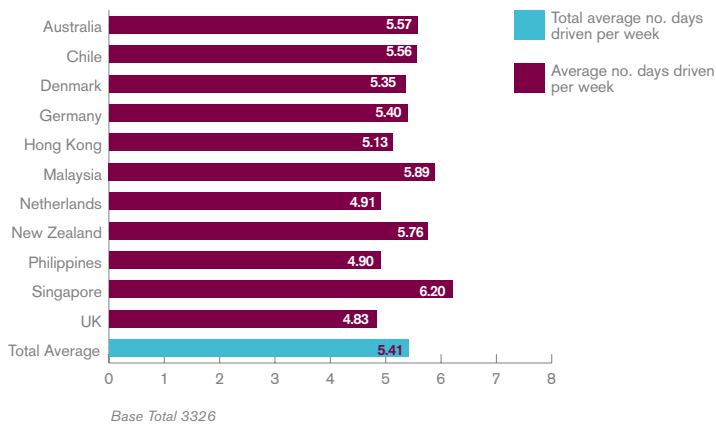


Fig.3

Background: How people drive 1.2 When drivers refuel

- Just one in ten of all drivers refuel when the tank is still half full (fig.4).
- A much larger proportion, at least two-fifths, are filling up when the tank shows quarter full.

These drivers tend to be older and they refuel fairly frequently. However, they are no more or less likely than the average motorist to be Fuel Economy Active.

A third of drivers across these countries wait until the fuel gauge is showing empty / red.

When drivers put fuel in their car...

Q2: In general, when do you decide to put fuel in your car?

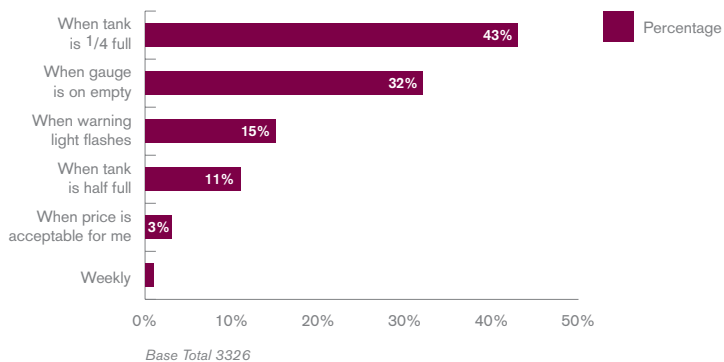


Fig.4

Motorists drive between 5 & 6 days a week on average.

Drivers in Singapore, Malaysia & New Zealand record the highest driving frequency.

Motorists who drive people carriers are more likely to be frequent drivers.

47%
of all drivers drive every day

Two-fifths of drivers across countries are filling up when the tank shows a quarter full.

A third of all drivers wait until the fuel gauge is showing empty/red.

32%
refill when the gauge is on empty

Section 1

Background: How people drive 1.2 When drivers refuel

Put fuel in the car... Petrol vs. Diesel

Q2: In general, when do you decide to put fuel in your car?

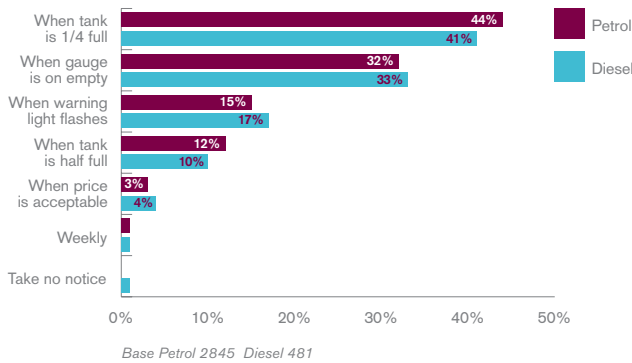


Fig.5

Fifteen percent wait until the fuel warning light comes on before refuelling.

So, looking more closely at these drivers:

- They tend to be frequent drivers (5+ days per week), though not necessarily doing high mileage.
- They are more likely than average to be under 35.

There are some notable differences in refuelling habits by geographical area (fig.6).

- In Chile, for instance, drivers seem to be keen on topping up their tanks well before they run empty. Maybe because, as the survey shows, increases in fuel prices have had limited effect on how people drive in this country. This could also be affected by regular but small re-fuelling, rather than full, intermittent refuelling, a pattern that can be seen among some drivers.
- At the other extreme, we see that in Europe drivers in both Germany and Denmark tend to wait until their tank is virtually empty before filling up.
- In Malaysia we see a similar pattern. At the same time, it is clear that there are different factors surrounding refuelling practices in Malaysia from those in Europe. This would include the degree of choice that drivers exercise with relation to driving and fuel according to the prevailing economic conditions where they live.

It is worth noting that because the question is multiple rather than single response there is no way of stating conclusively the preferences or habits of different sub-groups.

Put fuel in car... by country

Q2: In general, when do you decide to put fuel in your car?

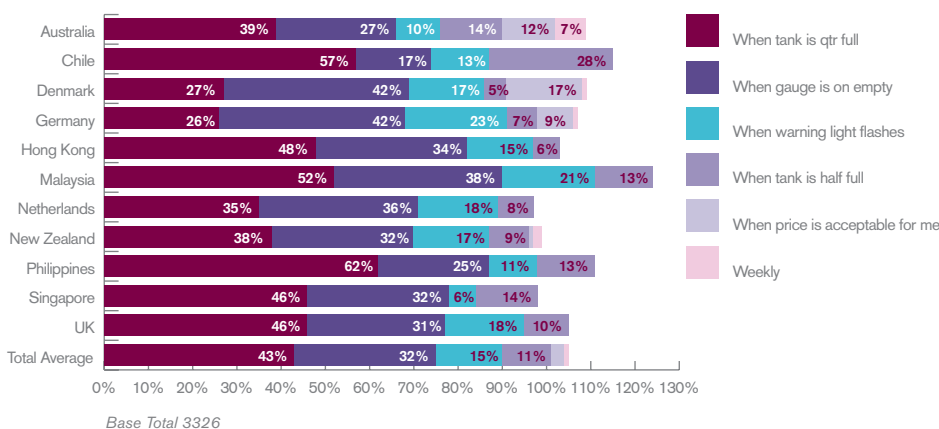


Fig.6

Background: How people drive

1.3 Main reasons for car journeys

People are obviously using their cars for a variety of purposes (fig.7). Shopping visits are one major reason for using the car throughout these countries (68% of all drivers surveyed use their cars for shopping).

- This rises to nearly eight in ten Australian (77%), New Zealand (79%) or German drivers (77%).
- Seventy seven percent of women are using the car in this way compared with 63% of men. This is likely to be due partly to economic factors (we would assume more women own cars and multi-car ownership in households is more prevalent in the aforementioned countries).
- Conversely those living in Singapore were the least likely to use their car for shopping (44%).

Interestingly, even though shopping is a popular reason for driving, it is not the most heavy car users who are mainly engaged in this. The shoppers group is characterised by low frequency of driving, low frequency of refuelling and low overall mileage.

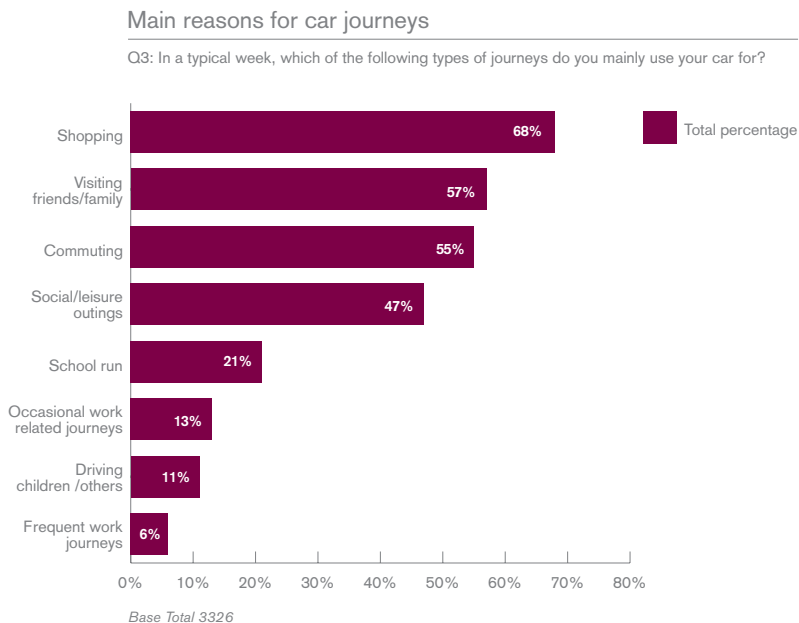


Fig.7

In Germany and Denmark, drivers tend to wait until their tank is empty before refuelling.

In Chile, drivers tend to top up well before it runs empty.

Nearly seven in ten car motorists use their car for shopping.

The 'shopper' group is characterised by low frequency of driving and low frequency refuelling.

'Commuters' are heavy car users and refuellers but are less likely to be Fuel Economy Active.

55% of drivers use their car for commuting

1.3 Main reasons for car journeys

Well over half of all drivers use their cars for visiting their friends / families and for commuting to place of work / study (57% and 55% respectively).

- In New Zealand and the Netherlands there is a particularly strong emphasis on social visits by car (65% and 64% respectively).
- Globally, those driving to visit family and friends are very similar in profile to the shopping group in that they have a low frequency of driving and refuelling, and low overall mileage. However, they are equally likely to be men or women.

The commuting segment presents a rather different driver profile.

- These are heavy car users, clocking up >15,000km per year on average, with 7 in 10 using their car every day.
- They tend to refuel at least once per week.
- At the same time, and perhaps rather alarmingly in light of this heavy car usage, they are no more likely to be Fuel Economy conscious.

- Singapore and Malaysia have the highest concentration of commuters to work / study (77% and 78% respectively).

- On the other hand, drivers in Australia, UK and Philippines are least likely to use their car for this purpose.

Looking at the other reasons for getting into the car: one in five use the car for the school run.

- Interestingly, this category represents the second heaviest car user group after commuters in terms of weekly usage and annual mileage.
- School run drivers are more prevalent in the Philippines, Malaysia and Chile (37%, 31%, and 28% respectively).

We see from cluster analysis on the survey that many higher mileage drivers tend to have shorter-term vision and lower awareness about Fuel Economy and usage thereby making them Fuel Economy Sceptical. This further verifies the findings about the level of Fuel Economy Active drivers in different countries.



**Commuters
are no more
Fuel Economy
conscious**

Background: How people drive

1.4 Attitudes to cars and driving

People on the whole enjoy driving; among the statements asked about, freedom of movement and the enjoyment in driving a car attract the highest agreement scores (fig.9).

- Nearly nine in ten feel in some way conscious of the freedom of movement their car gives them (56% agreeing strongly).
- Fuel Economy Actives are more aware of this sense of freedom.
- Women over 50 (95%) are especially likely to be aware of this freedom.

Three-quarters of all drivers agree they enjoy driving most of the time. Australian (82%), New Zealand (83%) and Hong Kong (88%) drivers enjoy driving the most. Looking at the other end of the scale, a much lower proportion, 15% of the total are in disagreement with this sentiment. The latter minority possibly coincides with the 16% who often feel stressed when driving. UK drivers are the most stressed (28%).

One in two drivers globally would feel they are a car person. This is particularly key in Hong Kong where the figure rises to 8 in 10. The Philippines and Denmark come joint second in following the car culture (55% disagreeing 'I am not a car person').

Looking at the view of the car's function as providing a necessary means of transport, a considerable majority (two thirds of all drivers) believe their car is only there to get them from A to B.

- The sentiment is more prevalent among those aged 55+ (77% agreement).
- The group is low mileage drivers, infrequent drivers and infrequent refuellers.
- As a group, they claim to be no more Fuel Economy Active than others.

One in two drivers, however, would feel they are a 'car person'. This is particularly true in Hong Kong where the figure rises to 8 in 10. The Philippines and Denmark come joint second (55% disagreeing with the statement 'I am not a car person').

We can also deduce that drivers who are less image conscious with regard to driving, while at the same time adopting a functional outlook, tend to fall into the cluster 'Fuel Economy Enthusiasts'. Another interesting area is in the car as a symbol of status. This attitude can be aligned with the cluster 'Fuel Economy Sceptics'.

- Around two-fifths agree that they would choose a car mainly for its looks.
- They tend to be high mileage drivers.
- Well over half of young male drivers across these countries tend to choose the car for its looks.
- They are not Fuel Economy Active and in fact feel little control over their fuel usage.

Singapore & Malaysia have the highest concentration of commuters.

88%
of drivers are conscious of the freedom driving gives them

Three-quarters of all motorists interviewed enjoy driving most of the time.

Two-thirds of all drivers surveyed view their car as a necessary means of transport.

One in two drivers feels they are a car person.

Drivers who tend to choose a car for its looks are less likely to be Fuel Economy Active.

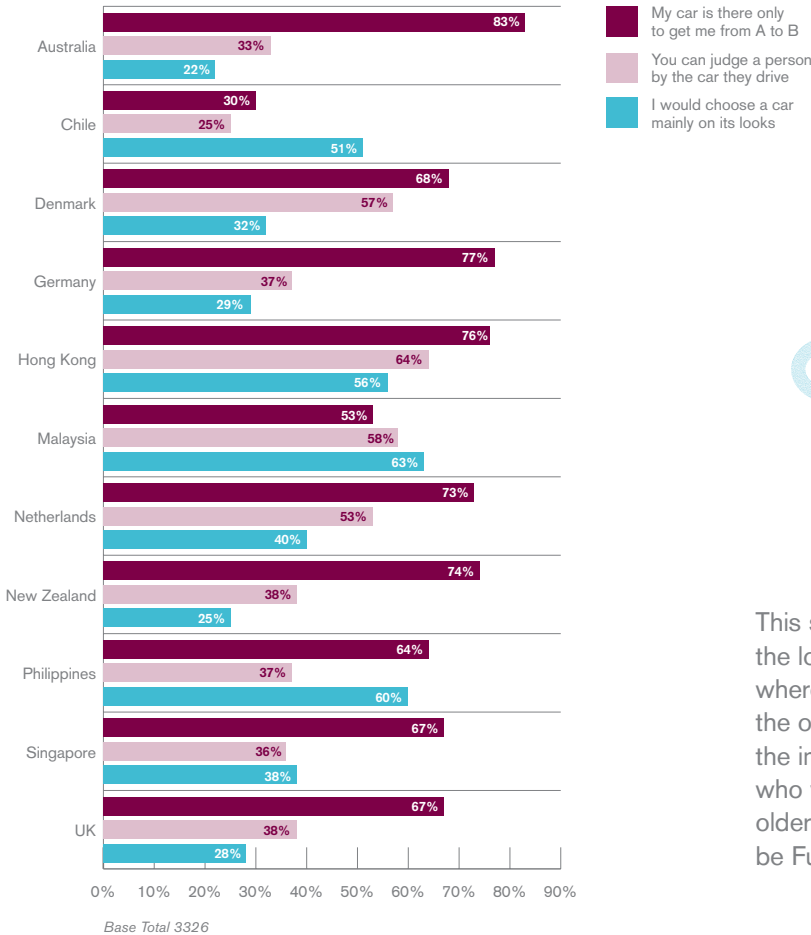
Two-fifths (primarily high mileage drivers & motorists in Asia and Latin America) would choose a car for its looks.

Section 1

Background: How people drive 1.4 Attitudes to cars and driving

Attitudes to cars and driving – by country

Q4: I am now going to read you out some statements that people have said about how they feel about their car and driving in general. Please tell me how much you agree or disagree with each of the following statements or neither agree nor disagree? (Based on the following three statements)



15%
often feel
stressed
in their cars

This study indicates that in Asia and in Latin America the look of the car strongly influences attitudes, whereas drivers in Australasia and Europe tend to be of the opposite opinion and do not care as much about the impression a car might make (fig.8). Those drivers who would not choose a car for its looks (especially older females) are more likely than average to claim to be Fuel Economy Active.

Fig.8

Attitudes to cars and driving

Q4: I am now going to read you out some statements that people have said about how they feel about their car and driving in general. Please tell me how much you agree or disagree with each of the following statements or neither agree nor disagree?

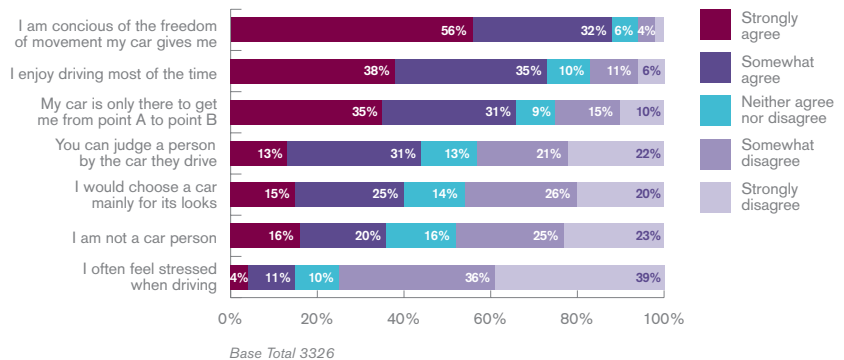


Fig.9

Background: How people drive

1.5 Checking fuel consumption

Overall, seven out of ten drivers do consider the mileage a car will give them prior to purchase (fig.10). Therefore most of the motorists surveyed would take this measure. However, once in possession of the car, an increasing number of factors come into play which affect whether ongoing Fuel Economy checks are made.

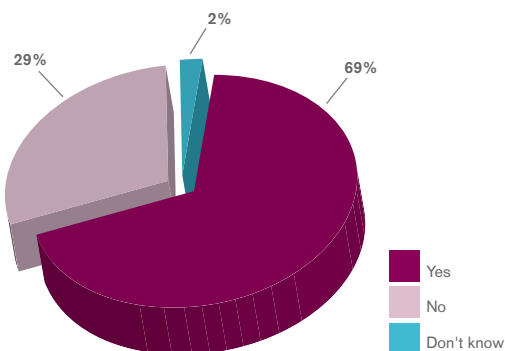
This leaves a sizeable portion who do not consider the mileage a car will give them when they are purchasing and who consequently are less likely to feel in control of their fuel consumption.

- Looking at geography, drivers in Chile and Germany are ahead in claiming they think about mileage (87%, 91% 'Yes') while those in the Netherlands and Hong Kong are least likely to consider it (49%, 52% 'No').
- Hong Kong and the Netherlands stand out. One in two drivers in these countries would not consider mileage at that stage.

Not surprisingly, the Fuel Economy Active drivers are more conscientious about checking the mileage of a car they are purchasing or the mpg / kmpl of their current vehicle.

Considered mileage before purchase

Q5: Thinking about purchasing a car, would you think about the mileage a car will give you before purchasing it?



Base Total 3326

Fig.10

increase with fuel use consciousness, so some drivers in this category are more rigorous in this area.

- Those who have checked mpg / kmpl are more likely to be Fuel Economy Active (three -quarters check it) and to feel a lot of control over Fuel Economy (78% of those saying a lot of control do check).
- Men are considerably more likely to monitor this than women, and notably older men.

Encouragingly, the practice of checking fuel consumption rate raises fuel consciousness; those doing it are now more aware about Fuel Economy than 12 months ago.

Far fewer motorists actually monitor the consumption once they have the car than think about mileage at purchase stage. At the same time, the practice of having checked mpg / kmpl does

Seven in ten drivers consider the mileage a car would give before purchase.

Drivers in Chile and Germany are ahead in claiming they think about mileage a car will give them before purchasing, whereas motorists in the Netherlands and Hong Kong are least likely to consider it.

Drivers who check fuel consumption are more fuel conscious

69%
consider mileage
before
purchase

Those who check miles per gallon (mpg) / kilometres per litre (kmpl) are more aware about Fuel Economy than 12 months ago.

Men as well as drivers of diesel cars are considerably more likely to check miles per gallon (mpg) / kilometres per litre (kmpl).

Section 1

Background: How people drive 1.5 Checking fuel consumption

Ever checked MPG/KPL?

Q6: Have you checked how many miles per gallon/kilometres per litre you can get from your car?

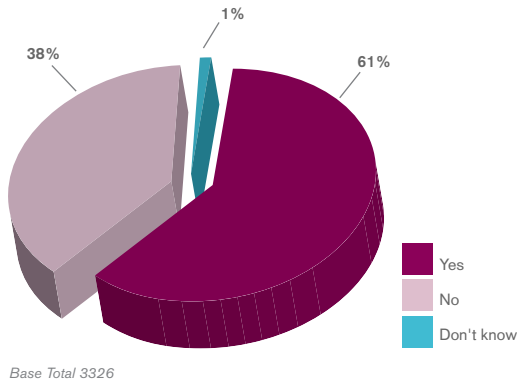


Fig.11

Drivers of diesel cars are considerably more likely to have checked this (74%). Indeed, apart from the UK, there is a positive relationship between prevalence of diesel vehicles in a country and practice of checking mpg / kmpl of the car.

- Germany, the Netherlands, Denmark, and the Philippines give it most consideration.
- Malaysia, New Zealand, Australia, Singapore and Hong Kong are least rigorous about checking it.

We notice later that, apart from the Philippines where diesel consumption is relatively high, the Asian countries exhibit least control over fuel usage generally. Once again, this is indicated in the cluster analysis, whereby Hong Kong, Singapore and Malaysia remain predominantly Fuel Economy Sceptical.

In turn these countries also tend to rate lower in overall Fuel Economy awareness.

Fuel Economy Actives are notably more likely to have checked their fuel consumption, but in terms of frequency of doing so, they check their mpg / kmpl only slightly more frequently than the Fuel Economy Passives (Actives 63% once a month, Passives 55% once a month) (fig.12).

- 8% of drivers check their mpg / kmpl every day.
- A third check it at least on a weekly basis.
- Male drivers tend to do a check more frequently than women.
- The most common checking frequency is less often than weekly and more often than once a month (27%).

Frequency of checking MPG/KMPL

Q7: How frequently would you say that you check how many miles per gallon/kilometres per litre your car is getting? Would you say that you check...



Fig.12

Perception of control over MPG/KMPL

Q8: How much control do you feel that you have over the number of miles per gallon/kilometres per litre you can get from your car?

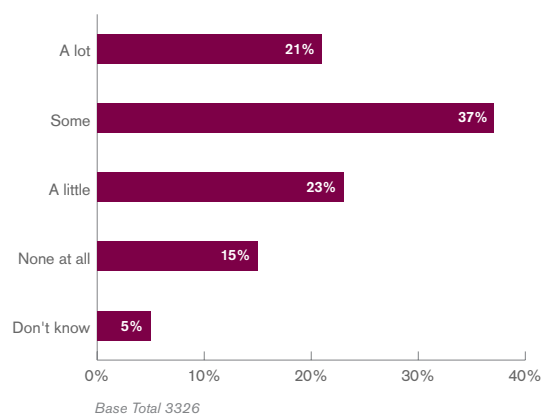


Fig.13

Background: How people drive

1.6 Perception of control over fuel consumption

Drivers do not feel sufficiently in control over the fuel usage of their cars, with well over a tenth having no sense of managing this at all. Sixty percent feel they have only a little or some control over this area (fig.13).

- Fuel Economy Actives do inevitably feel they manage this better (mean 1.94), however this still leaves much room for improvement (fig.15).
- Three-fifths of drivers feel at least some sense of control over their Fuel Economy. This splits 21% a lot and 37% saying some control.
- A further fifth feel they have only a little control and 15% feel they have none.

So, while in some countries the majority feel some level of control over fuel usage, this perception varies dramatically by region, with Europeans and Australasians feeling more control than Asians (apart from in the Philippines where sense of control is highest out of all Asian countries included) and Latin Americans (fig.14).

- Control is highest in Germany (44%) and lowest in Singapore (7%) saying a lot.
- Perhaps one in three drivers in Hong Kong and Singapore feel no real sense of managing their Fuel Economy.

Drivers of diesel cars again feel more in control than those using petrol (A lot/Some 70% diesel; 56% petrol).

Men (62%) feel more in control than women (52%).

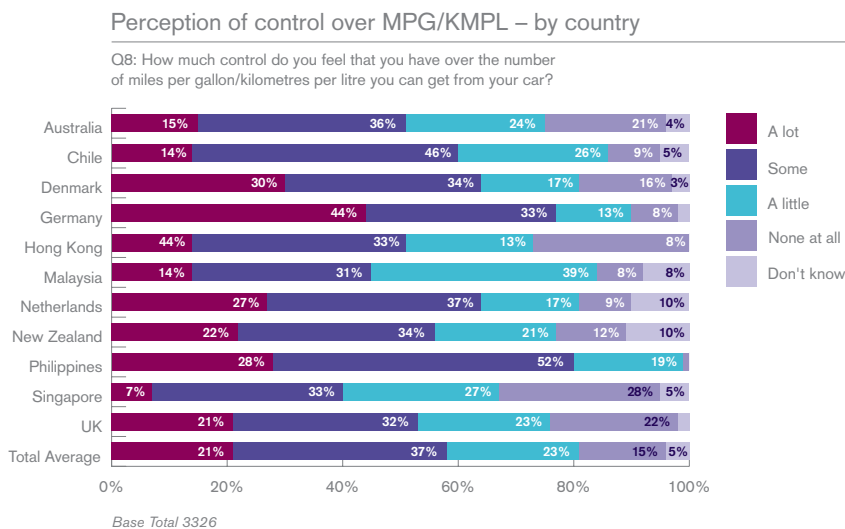


Fig.14

Three-fifths of drivers feel some sense of control over their fuel consumption.

German drivers have most control of fuel consumption.

4 in 10
feel they have little or no control

Men
feel more in control than women

Drivers in Singapore have least control.

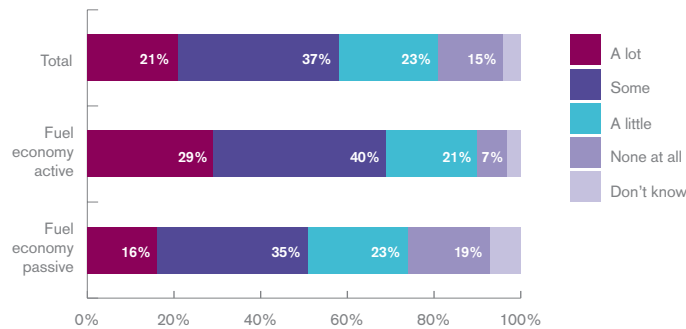
Drivers of diesel cars feel more in control than those using petrol.

77%
of German drivers feel a sense of control over mpg/kmpl

Background: How people drive 1.6 Perception of control over fuel consumption

Perception of control over MPG/KMPL – Fuel economy active vs. passive

Q8: How much control do you feel that you have over the number of miles per gallon/kilometres per litre you can get from your car?



Base Total 3326 FEA 1216 FEP 2058

Fig.15

Background: How people drive 1.7 The times when drivers are more aware of fuel usage

Drivers are in fact very conscious of their fuel usage during typical driving experiences, and not surprisingly those who are Fuel Economy Active tend to remain aware at these times. The challenge is in translating this to changing attitudes, and then relevant action.

The driving moments which increase awareness for most drivers of the fuel consumption of their car generally are *during a long journey (73%)* and *when the fuel gauge is low / near empty (66%)* feeling more awareness of fuel usage) (fig.16, opposite).

- Those who are more aware when the fuel gauge is low, tend more to be women who claim to be Fuel Economy Active.
- Those in New Zealand (84%), Australia (78%), UK (77%) and Chile (74%) are most likely to be aware when the fuel is low.
- A majority of drivers (50%+) also indicate that they notice their fuel consumption *when buying fuels, when in traffic jams, when driving fast, or when they put their foot down.*

Motorists are more aware of their fuel consumption during typical driving moments (long journey, when the fuel gauge is low).

Potential for raising awareness of drivers when buying fuels

- Increased awareness while filling up is most prevalent among under 35s, among Fuel Economy Actives and among those who check their fuel consumption at least every month.
- In terms of geography, we are most likely to find drivers in this category in Germany, Australasia and Malaysia.
- Those running petrol cars are also more likely than diesel drivers to note it then.
- Drivers in Chile are particularly unlikely to be in this category.
- It is worth adding that, at the moment of fuel purchase, the price of fuel and the economic conditions by country inevitably also come into play.

72% of drivers are less aware of fuel consumption when with friends

56% of drivers feel aware about fuel consumption when they refuel

Other consciousness-raising moments include when in a traffic jam, when driving fast, or when drivers put their foot down.

When aware of fuel consumption

Q9: I am going to read out some driving moments. Please tell me if during any of these driving moments you are likely to be more or less aware of your fuel consumption?

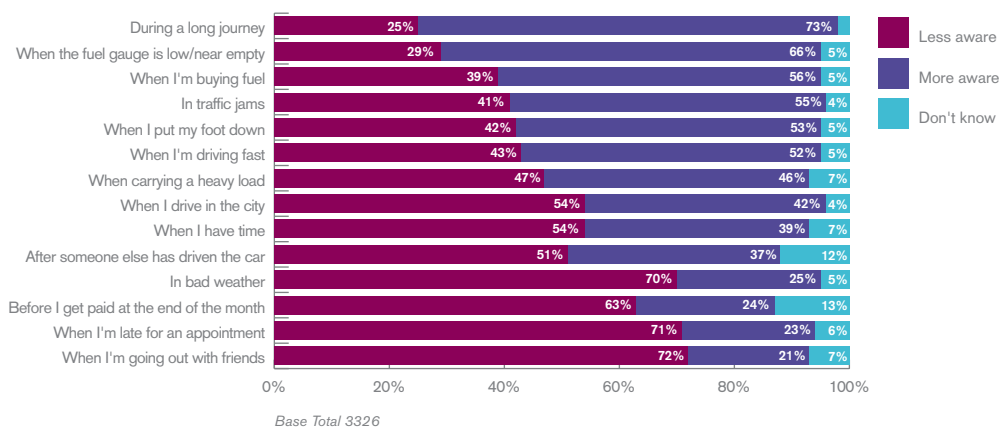


Fig.16

Section 2

Fuel Economy: How people feel about it

2.1 Who are the Fuel Economy Active drivers?

A low 37% of all drivers would describe themselves as Fuel Economy Active, that is, doing something to get more mileage out of their car. The main characteristics of this group are:

- Tend to be over 45 years
- Likely to be driving a station wagon/ estate car / car that uses diesel
- Likely to be low to medium mileage drivers, typically driving less than 15,000 km per year

Crucially, in this study we see that greater control over fuel consumption and more frequent checking of mpg/kmpl leads to greater Fuel Economy Activeness. In other words, we are seeing a more long term approach to consideration of fuel and mileage.

- Perhaps not surprisingly then, half of those saying they feel a lot of control over Fuel Economy are Fuel Economy Active.
- The same goes for those checking mpg/kmpl on a daily basis.

In all of the countries surveyed, those claiming to be Fuel Economy Active were in the minority. It would follow that, in terms of the activities practiced in order to improve Fuel Economy, there is considerable potential for growth in both awareness and implementation. Putting this into context by geography (fig.18):

- The Philippines and Australasia have most drivers claiming to be Fuel Economy Active, though still under half (46% and 44% respectively).
- European drivers tend to have a more active approach than average.
- Drivers in Hong Kong, Malaysia and Singapore are least likely to be active in this way (25%, 26% and 27% of drivers respectively).

Globally, Fuel Economy Active drivers tend to engage in up to 4 activities, at the very most, relating to Fuel Economy.

The next chart shows a breakdown of the things Fuel Economy Active drivers do in the context of getting more mileage from their cars.

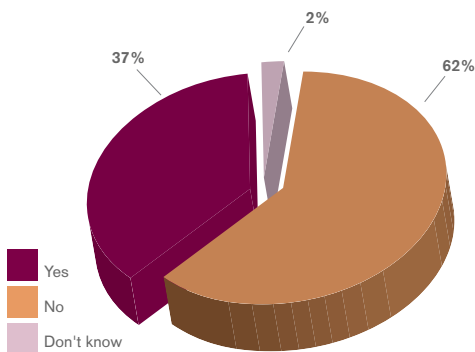
Fuel Economy Actives:

- A majority choose to drive sensibly (avoiding rapid acceleration / braking) – 51%.
- Three in ten also choose to *keep to speed limits* (31%).
- About a quarter *keep the engine properly serviced / tuned* (23%).
- A little less *keep the tyres properly inflated or drive in the highest gear possible* (13%).

These are the 5 or 6 main activities which drivers spontaneously mention as helping to improve their Fuel Economy. So we see that these drivers tend to demonstrate a relatively conservative or frugal approach to driving and fuel.

Fuel economy active/activities

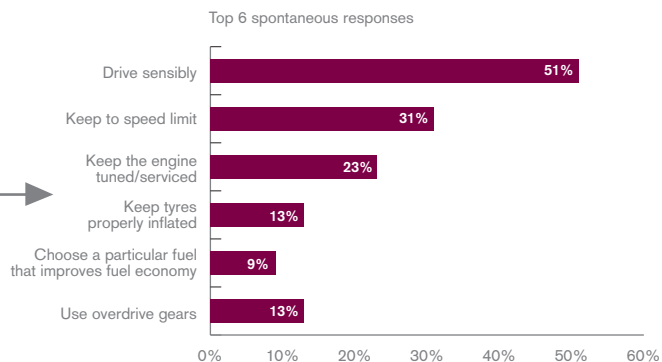
Q10: a) Do you currently do anything to get more mileage out of the fuel that you put into your car?



Base Total 3326

Fig.17

Q10: b) What do you currently do to get more mileage out of the fuel that you put into your car?



Fuel economy active – by country

Q10: a) Do you currently do anything to get more mileage out of the fuel that you put into your car?

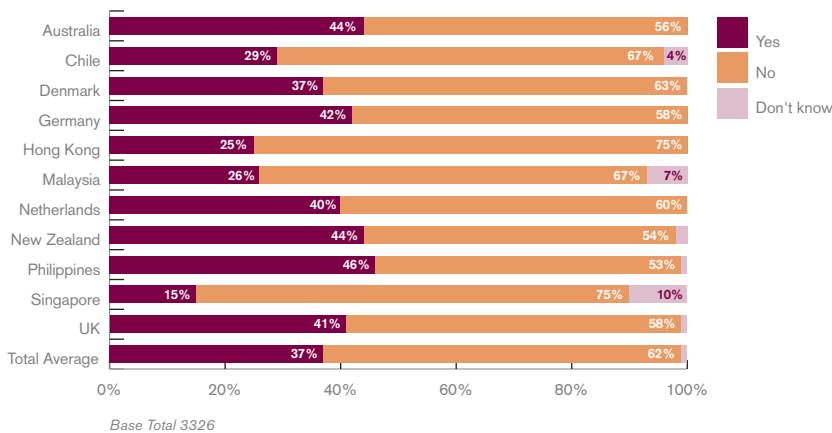


Fig.18

Looking more closely at who engages in the activities (Fuel Economy Actives):

- Women are more likely to mention *driving sensibly* and *adhering to speed limits*.
- It is predominantly male drivers who choose to *keep the engine properly tuned* (27% men / 18% women).
- Males under the age of 30 are considerably more likely to use a high gear to help improve economy (20%).
- Drivers in Denmark and Germany are most likely out of all the countries measured to drive sensibly (68% and 63%), while keeping to speed limits is important for Denmark and the Netherlands (50% and 45%).
- The Philippines and Hong Kong are, on the other hand, least likely to see sensible driving as a means of improving economy of consumption (27% and 30%).
- Six in ten of those in the Philippines tend to keep their engine properly serviced, the highest recorded out of all the countries. Drivers in the European countries and Hong Kong are least likely to do this.

Continuing on from this, the drivers who have checked their mpg / kmpl often are more likely to be actively trying to *drive sensibly* and *keep to the speed limit*. They are exhibiting more frugal behaviour.

Another activity mentioned without prompting is *choosing a particular fuel that can help improve Fuel Economy* (9% of all drivers currently doing this). The country which stands out in this area is Malaysia, with over 1 in 2 drivers spontaneously mentioning it. No other country really comes near (Philippines 13%, Singapore 13%).

Globally, even those saying they are Fuel Economy Active, do just 2 things or thereabouts (mean 2.34). Drivers in Malaysia are doing considerably more things on average (mean 5.04) whereas those in the UK and Chile are doing the least number of things (means 1.66 and 1.80 respectively).

Looking now at the small group globally who are doing lots of things to be more Fuel Economy Active:

- Age 25-30
- Higher annual mileages
- Frequent refuellers

Typical Fuel Economy Actives tend to be over 45 years, driving a diesel station wagon or estate car and likely to be a low to medium mileage driver.

In all countries surveyed, drivers who don't do anything to get more mileage from their car are more numerous than those who do something.

37%
of drivers are
Fuel Economy
Active

Australia (44%), New Zealand (44%) & the Philippines (46%) are countries where there is a higher percentage of Fuel Economy Actives (who do something to improve fuel consumption) compared to other countries.

Most Fuel Economy actives tend to drive sensibly, keep to the speed limit, keep the engine properly serviced and the tyres properly inflated.

Fuel Economy Actives tend to engage in around two activities related to Fuel Economy.

Section 2

Fuel Economy: How people feel about it 2.2. What drivers do to become Fuel Economy Actives

When drivers are asked to choose the most effective activity the practice of driving sensibly now increases its lead with a third of all drivers mentioning it (fig.19).

- Servicing the engine now becomes joint second along with adhering to speed limits (a tenth for each).
- Just 4% now mention choosing a particular fuel that can help improve Fuel Economy as the activity they would recommend.

- Crucially, 7% of drivers globally do not know which activity they would recommend. This again underlines the lack of knowledge about Fuel Economy practices.

Looking at geography, drivers in:

- Denmark and New Zealand are most likely to recommend driving sensibly (with 45% and 40%).
- Hong Kong and Chile are more likely to recommend keeping to the speed limit (24%, 21%).
- Malaysians are most likely to recommend choosing a particular fuel (28%).

Main activity recommended to get more MPG/KMPL

Q10: c) What is the ONE thing that you are currently doing and that you would recommend to others, that improves the number of miles you get per gallon/kilometres you get per litre?

Top 3 activities recommended – prompted

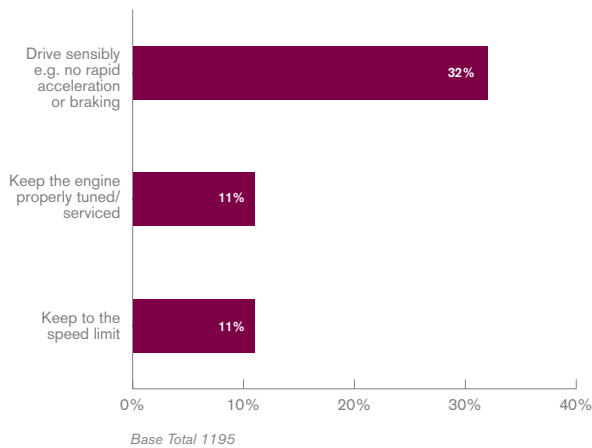


Fig.19

Activity	Total %
Drive sensibly e.g. no rapid acceleration and braking	32%
Keep the engine properly tuned/serviced	11%
Keep to the speed limit	11%
Use overdrive gears	5%
Choose a particular fuel that improves fuel economy	4%
Plan and combine trips	3%
Use my car more sensibly	3%
Keep tyres properly inflated	3%
Use cruise control selectively	3%
Use minimal air conditioning	3%
Remove excess weight	2%
Avoid peak hour driving	2%
Maintain car	1%
Specifically choose a more fuel efficient car	1%
Add fuel additives to the petrol	1%
Avoid driving when it is not necessary	1%
Turn engine off in traffic	1%
Don't know	7%

Fuel Economy: How people feel about it

2.3 What drivers are prepared to do to improve Fuel Economy – unprompted and prompted

Not surprisingly, Fuel Economy Actives are more interested in taking these activities up than the average driver.

The three initiatives people spontaneously mention as being things they are willing to do are the same as the top activities already engaged in:

- *Drive sensibly* (40% of all drivers - a majority in Denmark/Germany/Malaysia).
- *Keep to the speed limit* (28% globally - highest by Denmark, Netherlands, Malaysia).
- *Keep engine properly tuned* (22% overall - a majority in the Philippines).

The next three most important activities, mentioned by significantly fewer drivers:

- *Keeping tyres properly inflated* (13%).
- *Choosing a particular fuel that can help improve Fuel Economy* (12% - and half of Malaysians).
- *Removing excess weight* (11%).

Driving sensibly is considered the most effective activity to increase Fuel Economy.

Servicing the engine and adhering to the speed limit are also key activities motorists would recommend.

Overall, there is poor awareness of initiatives to help improve Fuel Economy.

Women are as willing as men to drive sensibly and keep to the speed limit but are not nearly as willing to keep the car engine serviced.

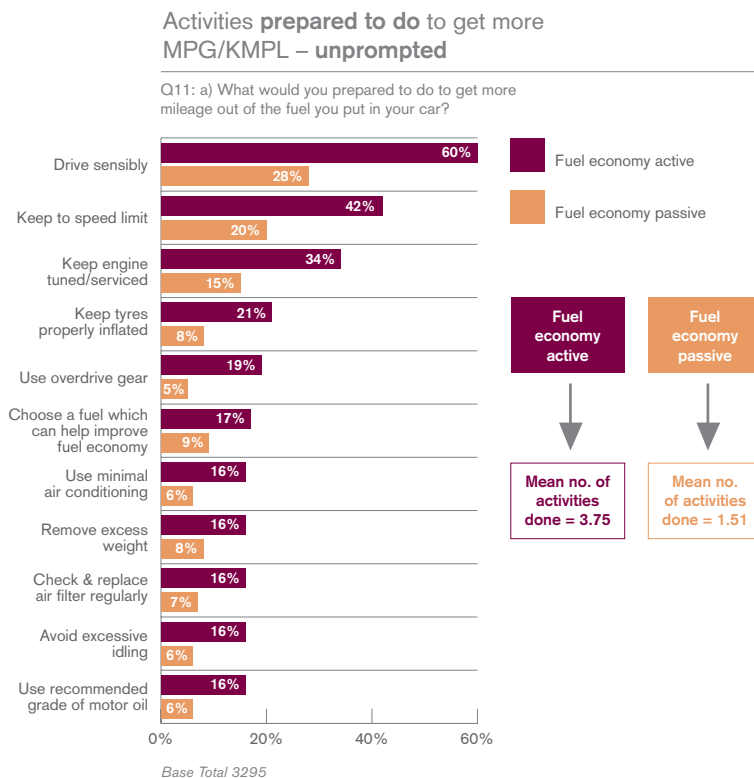


Fig.20

Section 2

Fuel Economy: How people feel about it

2.3 What drivers are prepared to do to improve Fuel Economy – unprompted and prompted

As we would expect, any spontaneous mention of activities in this realm is low among Fuel Economy Passives.

This time we find that female drivers across these countries are just as willing as men to drive sensibly and keep to speed limits, but not nearly as prepared to keep the car engine serviced in an effort to benefit Fuel Economy.

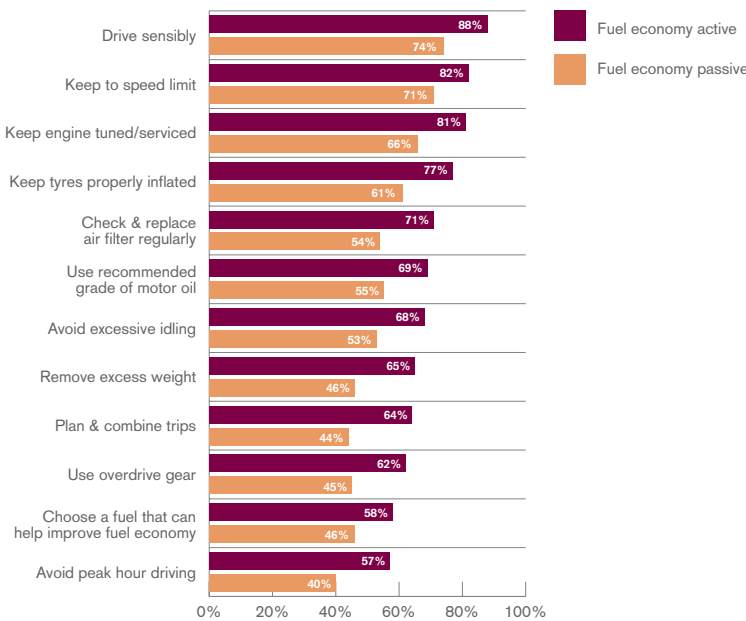
Interestingly, when drivers are prompted with a list, they keenly sign up for all kinds of activities to improve their Fuel Economy (fig.20). The dramatic increase from spontaneous to prompted, especially amongst the Fuel Economy Passives, reinforces the poor awareness globally of the initiatives that would make a difference and help drivers save money/fuel.

On the specific area of selecting a more economical fuel there is some latent interest, or perhaps curiosity amongst drivers:

- Unprompted, 12% would be willing to choose a particular fuel that can help improve Fuel Economy, more so in fact than the levels who would *use the recommended grade of motor oil or check and replace air filters* (fig.20 & 22).
- At the prompted stage half of all drivers would be prepared to choose a particular fuel that can help improve Fuel Economy, this time more than at spontaneous level would *drive in a high gear, combine trips or specifically choose a more fuel efficient car* (fig.21 & 22).

Top activities prepared to do to get more MPG/KPL – prompted

Q11: b) And which of these things would you be prepared to do to get more mileage out of your car? Prompted



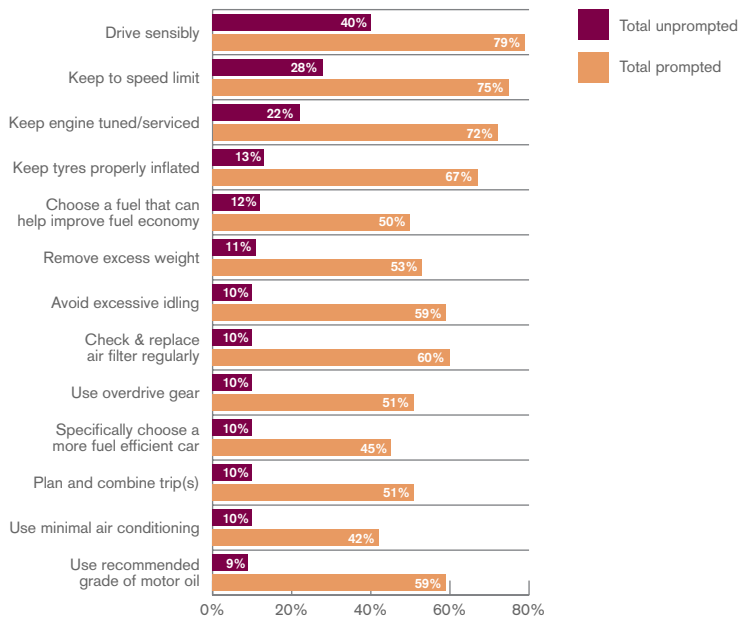
Base Total 3324

Fig.21

75%
of drivers
would consider
keeping to the
speed limit

Top activities prepared to do to get more MPG/KMPL – unprompted vs. prompted

Q11: a) & b) And which of these things would you be prepared to do to get more mileage out of your car? Unprompted/Prompted



Base Total unprompted 3295 and prompted 3324

Fig.22

Section 2

Fuel Economy: How people feel about it

2.4 Why drivers would become proactive on Fuel Economy

In order to be persuaded to be more conscious of fuel usage, in the sense that they themselves would actively do something, the motorist generally looks for some proof of there being cost savings in the process. They would like to know that a difference can be made to their back pocket were they to take up an activity of this kind.

- Two-thirds of drivers across these countries would need to know they were making savings in any pursuit of Fuel Economy (fig.23).
- The same proportion would like to be using fuel that gives them more mileage.
- Well over 50% also want to have more information, advice or guidance on how to improve on Fuel Economy in the future.

Continuing from this, encouragingly, around half would do something if they were sure it would help the environment.

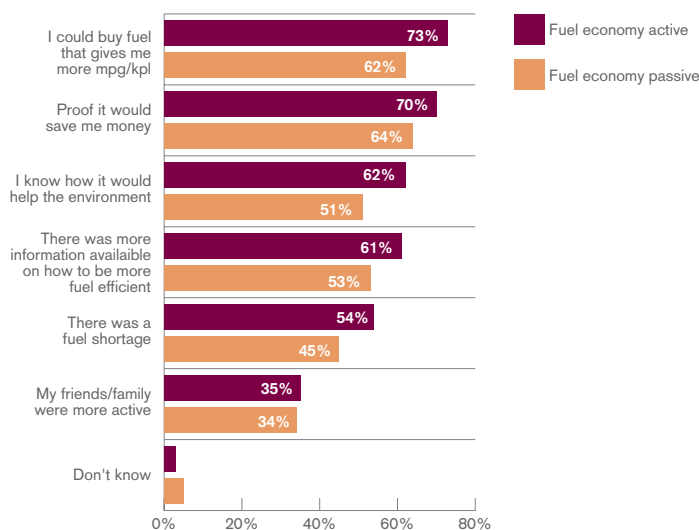
About the same amount would be prepared to do so if there were a fuel shortage.

We do see differences across geography, and drivers in some countries are more open to persuasion about acting in the interests of Fuel Economy than others (fig.24).

- At least 7 in 10 drivers in New Zealand, Australia and the UK would be prepared to look at any of these options.
- Those in Malaysia, Singapore and Chile are less open to practical ideas in improving their Fuel Economy.
- The perceived expense of doing something is a major issue for drivers throughout the countries surveyed, though less so in Chile.

Reasons to be more fuel economy active

Q12: Which of the following, if any, would persuade you to be more active in improving the fuel economy of / getting more miles per gallon/kilometres per litre from / your car?



Base Total 3326

Fig.23

Reasons to be more fuel economy active –
top two statements by country

Q12: Which of the following, if any, would persuade you to be more active in improving the fuel economy of / getting more miles per gallon/kilometres per litre from / your car?

Country	Statement	Percentage
Australia	There was proof it would save me money	90%
	I knew it would help the environment	89%
Chile	I could buy fuel that gives me more miles per gallon/km per litre	62%
	There was proof it would save me money	47%
Denmark	I could buy fuel that gives me more miles per gallon/km per litre	76%
	There were a fuel shortage	68%
Germany	I knew it would help the environment	78%
	I could buy fuel that gives me more miles per gallon/km per litre	74%
Hong Kong	There was proof it would save me money	59%
	I knew it would help the environment	37%
Malaysia	I could buy fuel that gives me more miles per gallon/km per litre	62%
	There were more information available on how to be more fuel efficient	52%
Netherlands	There was proof it would save me money	57%
	I could buy fuel that gives me more miles per gallon/km per litre	55%
New Zealand	There was proof it would save me money	88%
	I could buy fuel that gives me more miles per gallon/km per litre	85%
Philippines	There were more information available on how to be more fuel efficient	71%
	I could buy fuel that gives me more miles per gallon/km per litre	66%
Singapore	There was proof it would save me money	55%
	I could buy fuel that gives me more miles per gallon/km per litre	39%
UK	I could buy fuel that gives me more miles per gallon/km per litre	87%
	I knew it would help the environment	85%

Base Total 3326

Fig.24

- A number of countries would be persuaded if they could purchase a more economical fuel, this more prevalent in European countries.
- Lack of information is a key barrier to action in the Philippines and Malaysia.

Women, especially those over 50, are more easily persuaded by the reasons given than men.

Two-thirds of drivers would need to know they were making savings in any pursuit of Fuel Economy.

35%
would be more Fuel Economy Active if their friends & family were

Over one in two want more information and advice on how to improve Fuel Economy.

Motorists in Australia, New Zealand and the UK are more open to persuasion on Fuel Economy.

Those in Malaysia, Singapore & Chile are less open to practical ideas.

50%
of motorists would do something if it would help the environment

Section 2

Fuel Economy: How people feel about it 2.5 Increasing Fuel Economy awareness compared with 12 months ago

Just one fifth of drivers feel a lot more conscious of their fuel consumption than a year ago. There has been some progress in drivers' knowledge and direction about the area but it remains slow.

Significantly, half of drivers globally still feel about the same as 12 months back with regard to their knowledge and awareness of fuel usage.

- Fuel Economy Actives are more likely to have become a lot or a little more aware in the past 12 months (fig.25).

- In terms of geography, a majority of drivers in Australasia, the Philippines and the UK have become more Fuel Economy conscious during this period.
- Perhaps unsurprisingly, Singapore and Malaysia are examples of where around two-thirds have not become more conscious of these areas – countries with low levels of Fuel Economy Actives.
- Indeed more than a fifth of Malaysian drivers feel less conscious about fuel usage than one year ago. This of course is partly due to drivers not been aware of what initiatives to take.

Fuel economy conscious compared to 12 months ago

Q14: How much more or less conscious would you say you are about fuel economy now compared to 12 months ago?

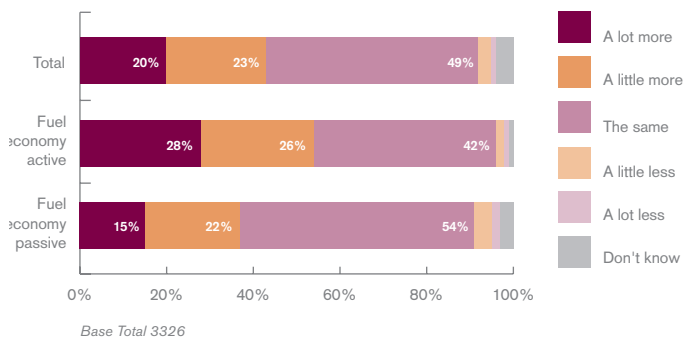


Fig.25

Fuel economy conscious compared to 12 months ago – by country

Q14: How much more or less conscious would you say you are about fuel economy now compared to 12 months ago?

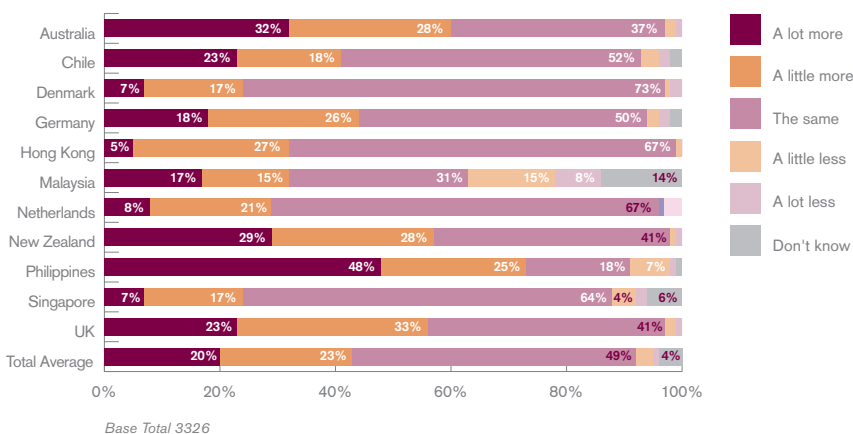


Fig.26

Fuel Economy: How people feel about it

2.6 Reasons for being more Fuel Economy conscious than 12 months ago

Looking at those who are more aware now, the price of fuel is of paramount importance in drivers' minds when they consider why they have become more aware of their fuel usage (51% mentioning this spontaneously). 'Price increases' has the most mentions for 9 out of the 11 countries in the study (fig.27).

Environmental considerations also play some part in their considerations about Fuel Economy, as does media coverage.

- In Chile and Singapore more than eight in ten cite price as a factor in this. Three-quarters of Malaysians also mention price (fig.28).
- The European countries are less likely to mention it.
- Environmental effects are more likely to be a reason in European countries or Australasia, as are efforts by the media to raise levels of consciousness.

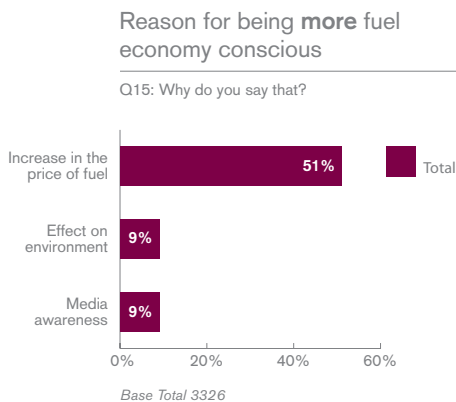


Fig.27

Reason for being **more** fuel economy conscious – top statement by country

Q15: Why do you say that?

Country	Statement	Percentage
Australia	Increase in the price of fuels	60%
Chile	Increase in the price of fuels	86%
Denmark	Increase in the price of fuels	27%
Germany	Increase in the price of fuels	39%
Hong Kong	Increase in the price of fuels	67%
Malaysia	Increase in the price of fuels	77%
Netherlands	Media Awareness	17%
New Zealand	Increase in the price of fuels	42%
Philippines	Increase in the price of fuels	59%
Singapore	Increase in the price of fuels	83%
UK	Media Awareness	24%

Base Total 1433

Fig.28

Half of drivers feel about the same as 12 months ago with regard to their knowledge & awareness of Fuel Economy.

Drivers in Australia, the Philippines and the UK have become more Fuel Economy conscious.

Price increase is the main reason for being more Fuel Economy active in nine out of the eleven countries surveyed.

This would be a key reason in Chile and Singapore but it is less mentioned in European countries.

Effect on the environment is given as a reason mainly in Europe and Australasia.

Section 2

Fuel Economy: How people feel about it

2.7 How increasing fuel prices impact the way people drive

Overall, 4 in 10 feel their driving is affected in some way by increasing fuel prices (fig.29, beneath). This varies a little by demographics with younger drivers (44% of under 25s) and low mileage drivers (49% of those driving <10,000km per year) noticing the pinch more acutely.

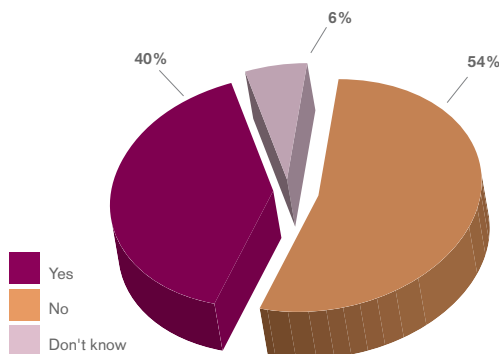
Crucially, well over half of drivers find that their driving patterns remain unaffected.

- Six percent of drivers globally are unsure about whether their behaviour has changed.
- Fifty six percent of Fuel Economy Actives are influenced by rising prices. Price causes people to be conscious of their fuel usage. Yet many either choose not to or are unable to do something.

- A staggering 8 in 10 drivers in the Philippines say their driving has been affected by the increasing price of fuel, followed by German drivers (51%) (fig.30).
- Drivers in the UK (28%) and the Netherlands (23%) claim to be least affected.
- Out of the price conscious segment, about half already reduced the amount of unnecessary driving.
- Most likely to do this are drivers in Hong Kong (61%).
- A quarter keep the speed down in an effort to reduce consumption.
- Most likely to do this are Chilean drivers (52%).
- Combining trips is the third option; drivers in Australia and Singapore are more likely to try this.

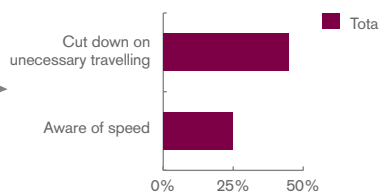
Effect of increasing fuel prices on the way people drive

Q16: In the last two years fuel prices have increased. Has this had any effect on the way you drive?



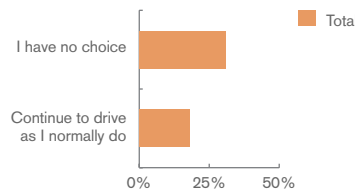
Base Total 3326

Q17: What effect has this had on the way you drive? Top 2 reasons



Base 1345 All saying fuel price has affected the way they drive

Q18: Why do you say that? Top 2 reasons



Base 1787 All saying fuel price has not affected the way they drive

Fig.29

- Of those whose driving remains unaffected, a third are driving because they have to (e.g. work journey) and a fifth continue as they always did or whatever reason.
- Half of Singaporean drivers see the necessity of having a car for routine transport (e.g. for journey to work) as a reason for them not to take action.
- Those in Chile and Hong Kong are most likely of the countries included in the study not to change and remain passive about Fuel Economy improvements. This is not surprising, given their lower levels of Fuel Economy consciousness.

Effect of increasing fuel prices on the way people drive – by country

Q16: In the last two years fuel prices have increased, has this had any effect on the way you drive?

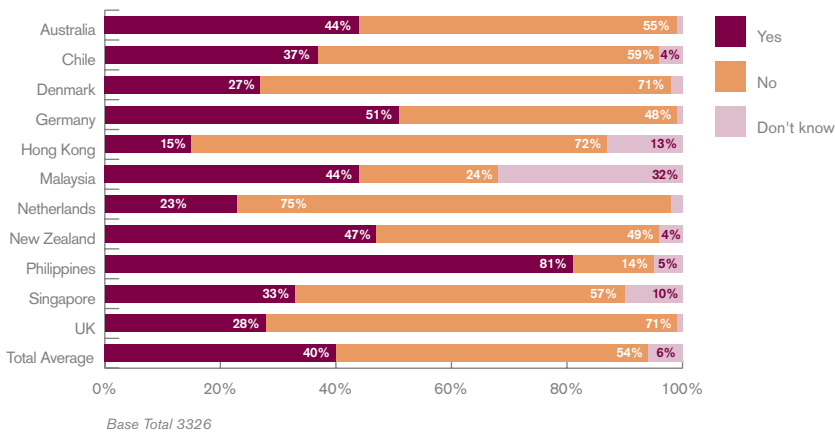


Fig.30

For four in ten drivers fuel price increase has affected the way they drive.

Those who have been affected have reduced the amount of unnecessary driving.

40% have changed how they drive due to rising fuel prices

6% are unsure about whether their behaviour has changed

Section 3

Personal advice about Fuel Economy 3.1 Who people turn to for advice about Fuel Economy

Globally, there is a range of possible trusted sources on improving Fuel Economy which drivers indicate they draw upon. Unfortunately, with what we know about the low overall engagement within the field of Fuel Economy, the fact that drivers seem to feel that so many different people represent credible and trustworthy sources of information simply reinforces the point of drivers' lack of direction about what information to believe and of which actions to take. This may also be a result of wide perceptions of what the advice could be e.g. ranging from very technical to general.

Proximity to the individual car that people drive is clearly important for any source that drivers are prepared to use. Indeed we find that a clear majority, at least six in ten drivers, indicate the mechanic at the garage where the car is serviced is the best source of guidance on the areas relating to improving the Fuel Economy of their car (fig.31).

To put this into context however:

1. Car service occasions tend to be infrequent, and
 2. We have already seen that just a quarter of all drivers mentioned proper servicing of their car as a means of helping them improve Fuel Economy.
- UK, Australia and New Zealand drivers tend more than others to trust the mechanic who services their car to give this kind of information (at least eight in ten drivers).

Half of all drivers tend to seek advice from family members or friends. We see later however that this is not one of the sources which is given more credibility by fuel economic drivers and this is verified by:

- Two-thirds in Malaysia would do so, the most trusted source for Malaysian drivers (a predominantly Fuel Economy passive country) (fig.32).

A good proportion, about two-fifths, would trust members of the public who have practical experience in Fuel Economy, or scientists in a related field, or automobile associations. A third would be happy to benefit from the guidance of anyone with practical expertise in running a car. At least one quarter of drivers globally would seek advice from the media.

- Women tend to be more receptive to advice from any of these 3 sources.

Looking at geographical differences in more detail:

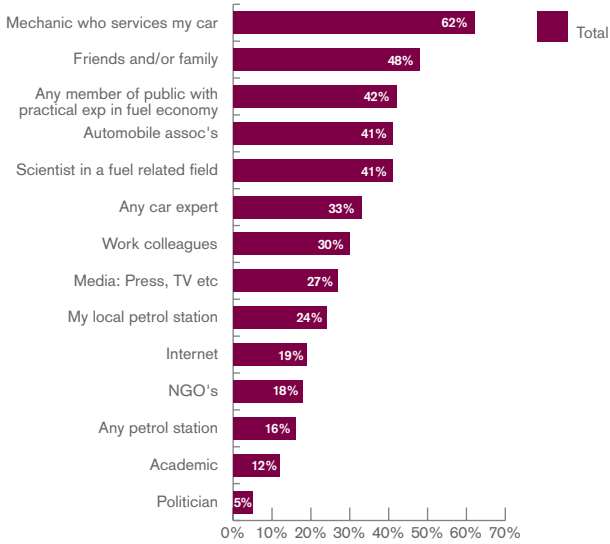
- Around two-thirds in the UK, the Philippines, Australia and New Zealand would look to people out there with practical experience in Fuel Economy. This could include work colleagues and petrol stations.
- Eight in ten of UK drivers tend to trust automobile associations for this information.
- Drivers in Australasia and Europe are more likely than elsewhere to seek advice using the Internet.
- New Zealand and Chile are least likely to cite the media (under 10% in each).

Petrol stations – local or otherwise – are also mentioned by at least one fifth as trusted information points and in many countries this would make sense, given the need for a source with practical experience of the fuel country. The UK, the Philippines, Germany, and Australasian countries would all see this as a useful source.

Throughout these countries, Fuel Economy Active drivers are more likely than passives to believe in any of the sources mentioned. Crucially, this excludes one source - friends and family. Friends and family are, however, second choice of advice point for the least fuel economic countries – Malaysia, Singapore and Hong Kong.

Credible sources of information

Q13: Who would be the most credible source of information to you personally, for advice on how to improve the fuel economy of your car?



Base Total 3326

Fig.31

Credible sources of information – top two statements by country

Q13: Who would be the most credible source of information to you personally, for advice on how to improve the fuel economy of your car?

Country	Statement	Percentage
Australia	Mechanic who services my car	83%
	Automobile Associations	74%
Chile	Mechanic who services my car	40%
	Scientist in a fuel related field	17%
Denmark	Scientist in a fuel related field	65%
	Mechanic who services my car	61%
Germany	Mechanic who services my car	72%
	Automobile Associations	65%
Hong Kong	Mechanic who services my car	48%
	Friends and or/family	47%
Malaysia	Friends and or/family	65%
	Mechanic who services my car	45%
Netherlands	Automobile Associations	71%
	Mechanic who services my car	51%
New Zealand	Mechanic who services my car	86%
	Any member of the public who has had practical experience in fuel economy	67%
Philippines	Mechanic who services my car	74%
	Any member of the public who has had practical experience in fuel economy	67%
Singapore	Friends and or/family	45%
	Mechanic who services my car	41%
UK	Mechanic who services my car	82%
	Automobile Associations	81%

Base Total 3326

Fig.32

Six in ten drivers would turn to the mechanic who services their car for advice on Fuel Economy.

5% of all drivers would seek advice from a politician

Two-fifths would trust members of the public who have practical experience in that area.

Petrol stations are mentioned by one fifth as trusted information points.

48% would seek advice from family & friends

Global Demographics

The sample is representative of the private motorist population in the countries surveyed. Of the global sample of drivers:

- 62% are male, 38% female.
- 8% are under 25, 23% 25-35, 27% aged between 35 and 45 and 43% were age 45+.
- Two-thirds own a saloon car while 12% drive estates and 8% off-roaders. One tenth own either a small car/ Mini / van.

The demographic splits are detailed below.

Gender	
Male	62%
Female	38%

Fuel used	
Leaded/unleaded petrol	86%
Diesel	14%

Age Group								
18-24	25-29	30-34	35-39	40-44	45-49	50-54	55-59	60+
8%	10%	13%	13%	14%	12%	12%	5%	14%

How often do you put fuel/gasoline into your vehicle?	
Every day	4%
4-6 times a week	4%
2-3 times a week	23%
Once a week	36%
3 times a month	8%
2 times a month	18%
Once a month	8%
Less often than once a month	

Car driven	
Saloon 2 or 4 doors	66%
Estate/Station wagon	12%
4x4/ off roader	8%
Small	6%
Van	4%
People carrier	3%
Coupe	1%
Sport car	1%

Kilometres driven per year	
5,000 or less	12%
5,001 - 10,000	19%
10,001 - 15,000	21%
15,001 - 20,000	17%
20,001 - 30,000	16%
30,000+	15%

Size of the engine	
1000 cc or less	4%
1001 - 1499 cc	19%
1500 - 1599 cc	17%
1600 - 1699 cc	15%
1700 - 2500 cc	31%
Above 2500 cc	10%
Don't know	4%

Cluster analysis

The table below shows the share of drivers per country who fall into each cluster (sceptical and enthusiasts).

Motorists in Australia, New Zealand and UK are more predominantly Fuel Economy Enthusiasts.

Those in Hong Kong, Malaysia and Singapore are most strongly Fuel Economy Sceptical.

Country:	FE Sceptical Cluster 1	FE Enthusiasts Cluster 2
Australia	17%	83%
Chile	84%	16%
Denmark	47%	53%
Germany	41%	59%
Hong Kong	88%	12%
Malaysia	94%	6%
Netherlands	65%	35%
New Zealand	22%	78%
Philippines	72%	28%
Singapore	99%	1%
United Kingdom	25%	75%

