

Mazda Driver Project

Research into consumers' views on the future of driving

14 December 2017



Ipsos Loyalty



Objectives and methodology

- Consumer research across 11 European countries to support a multi-national media relations campaign to help put Mazda at the heart of driving, in accordance with the Jinba Ittai philosophy and against the backdrop of the fast pace of change in the automotive industry.
- Research was conducted online between 7th and 22nd September through Ipsos' consumer research panels across Europe.
- At least 1,000 interviews were completed in each country.
- Quotas were set and weighting applied to the data to reflect the adult population in each country in terms of gender, age and region within each country.
- Some questions were asked of all; others of active drivers only (base sizes are indicated).



Objectives & Methodology

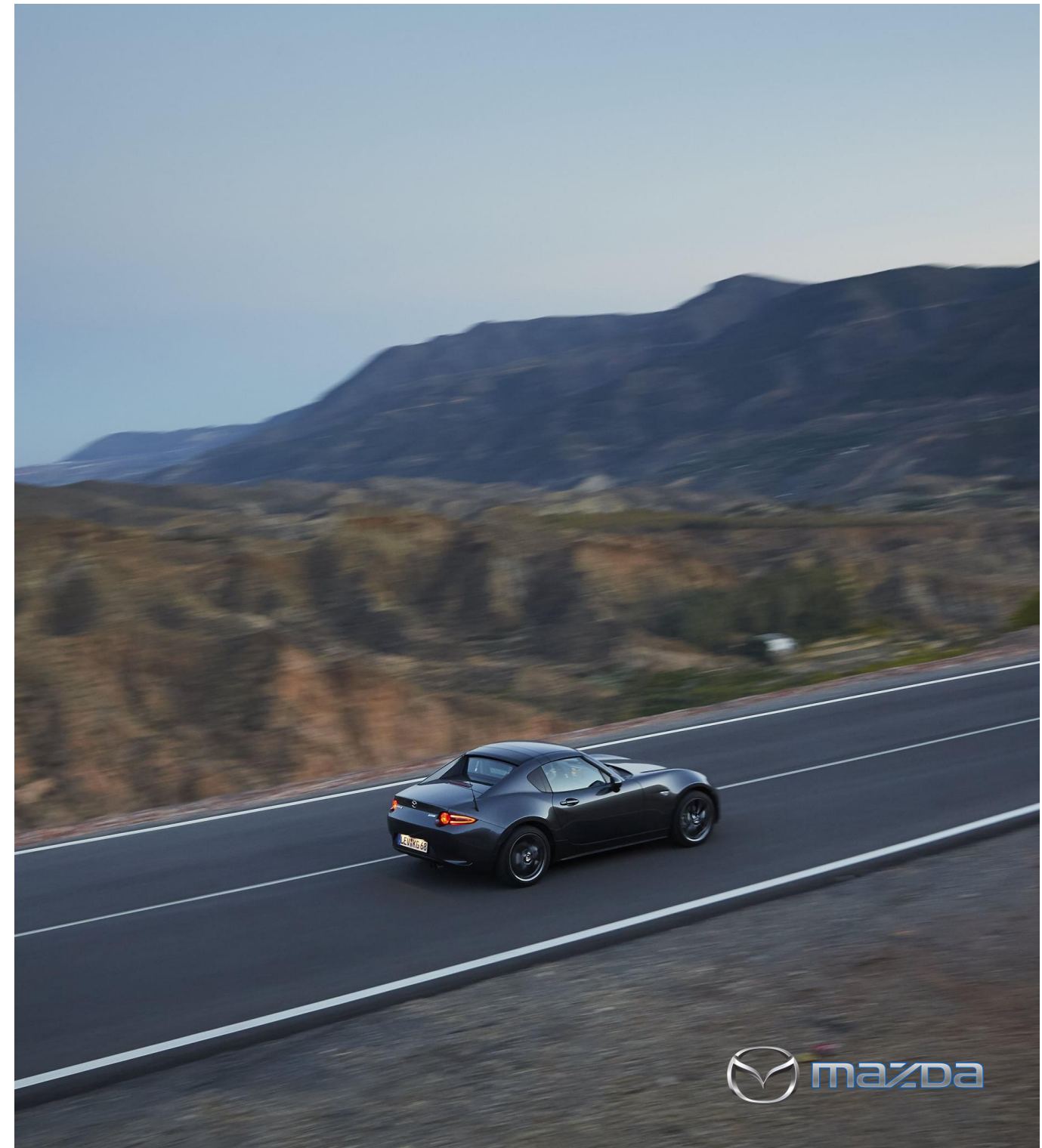


European regional findings

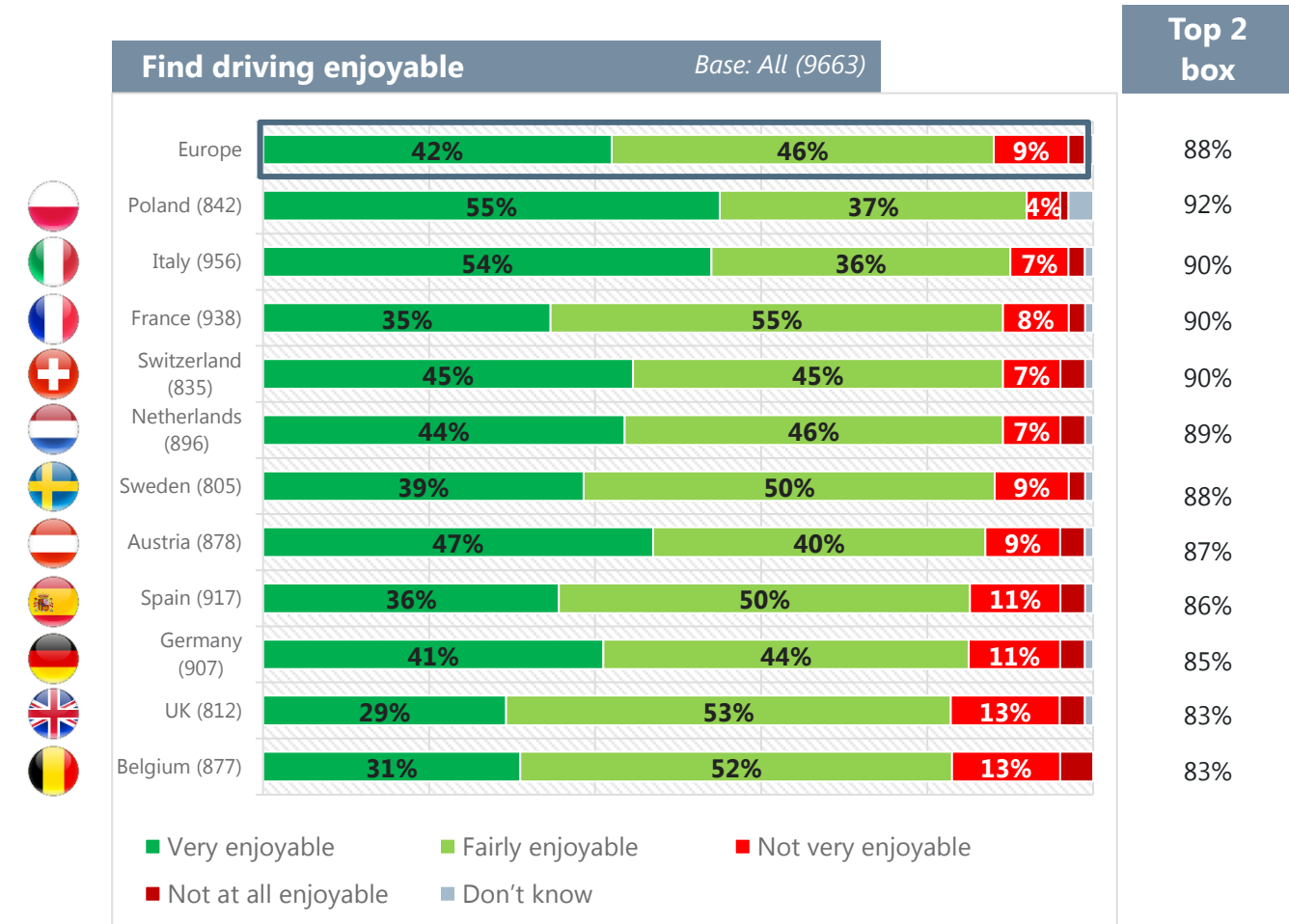
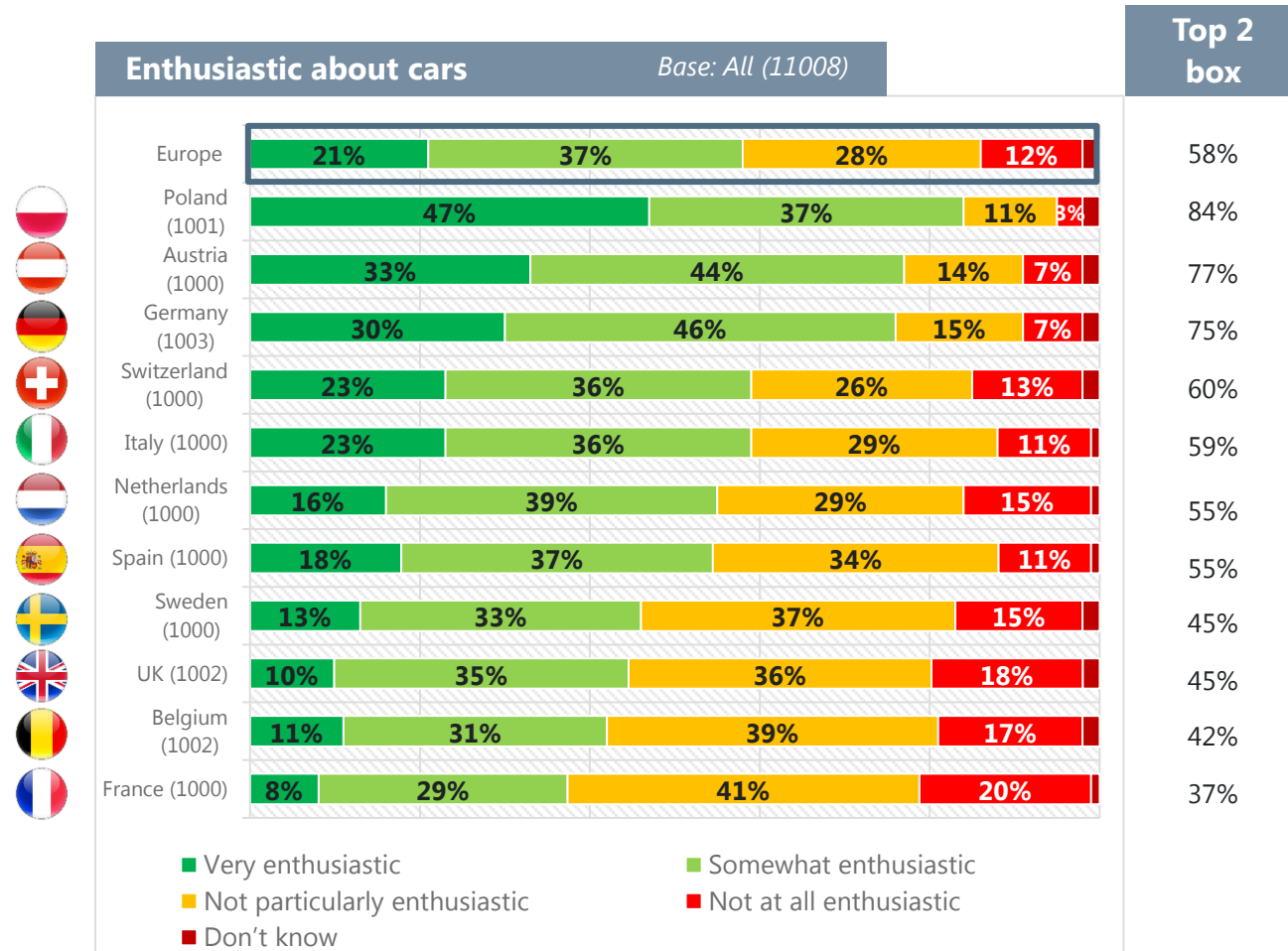
Overall enthusiasm for driving














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Poland leads the way for enthusiasm and enjoyment of cars and driving. Belgians and Brits are less keen.



Independence is the primary reason for those who enjoy driving. Half of those who enjoy driving in the UK (52%) and Poland (48%) also enjoy the control it gives.

Which reasons for enjoying driving apply to you												Base: All who enjoy driving (8455)
	Total	 (664)	 (766)	 (728)	 (843)	 (772)	 (863)	 (800)	 (773)	 (787)	 (708)	 (751)
Gives me independence	75%	81%	84%	75%	71%	79%	66%	75%	72%	72%	74%	79%
Being in control	38%	52%	39%	39%	36%	33%	26%	37%	48%	38%	43%	31%
It provides an escape from my daily routine	30%	36%	35%	31%	31%	28%	24%	20%	38%	32%	24%	32%
Helps me to relax	30%	28%	27%	31%	23%	25%	34%	30%	39%	33%	34%	26%
Puts me in a good mood	27%	22%	37%	20%	16%	36%	23%	21%	46%	19%	29%	32%
Is stimulating	18%	18%	13%	12%	14%	11%	28%	10%	16%	28%	30%	17%
The feeling of being at one with the car, like it's an extension of myself	16%	16%	16%	14%	9%	12%	18%	13%	27%	17%	18%	14%
Is exhilarating	14%	14%	21%	8%	8%	16%	3%	10%	27%	21%	19%	16%
None of these	5%	3%	4%	5%	7%	6%	4%	9%	2%	3%	7%	5%
Don't know	2%	1%	1%	1%	3%	1%	2%	2%	2%	1%	2%	2%

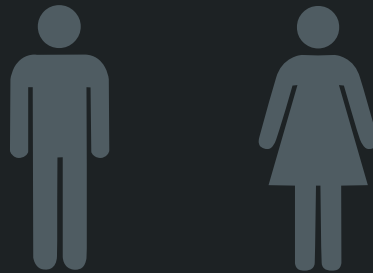
KEY
-5%<Total/+5%>Total

High density



Those in densely populated areas were more likely to say that driving was exhilarating or stimulating (**16%** and **20%** respectively)

Gender



Men were more likely to cite all reasons for enjoying driving except for independence which was the main reason for women to enjoy driving (**79%**)

Income



Low and medium income consumers were more likely than those with a high household income to say that driving provided an escape from their daily routine (**33%** and **32%** respectively)



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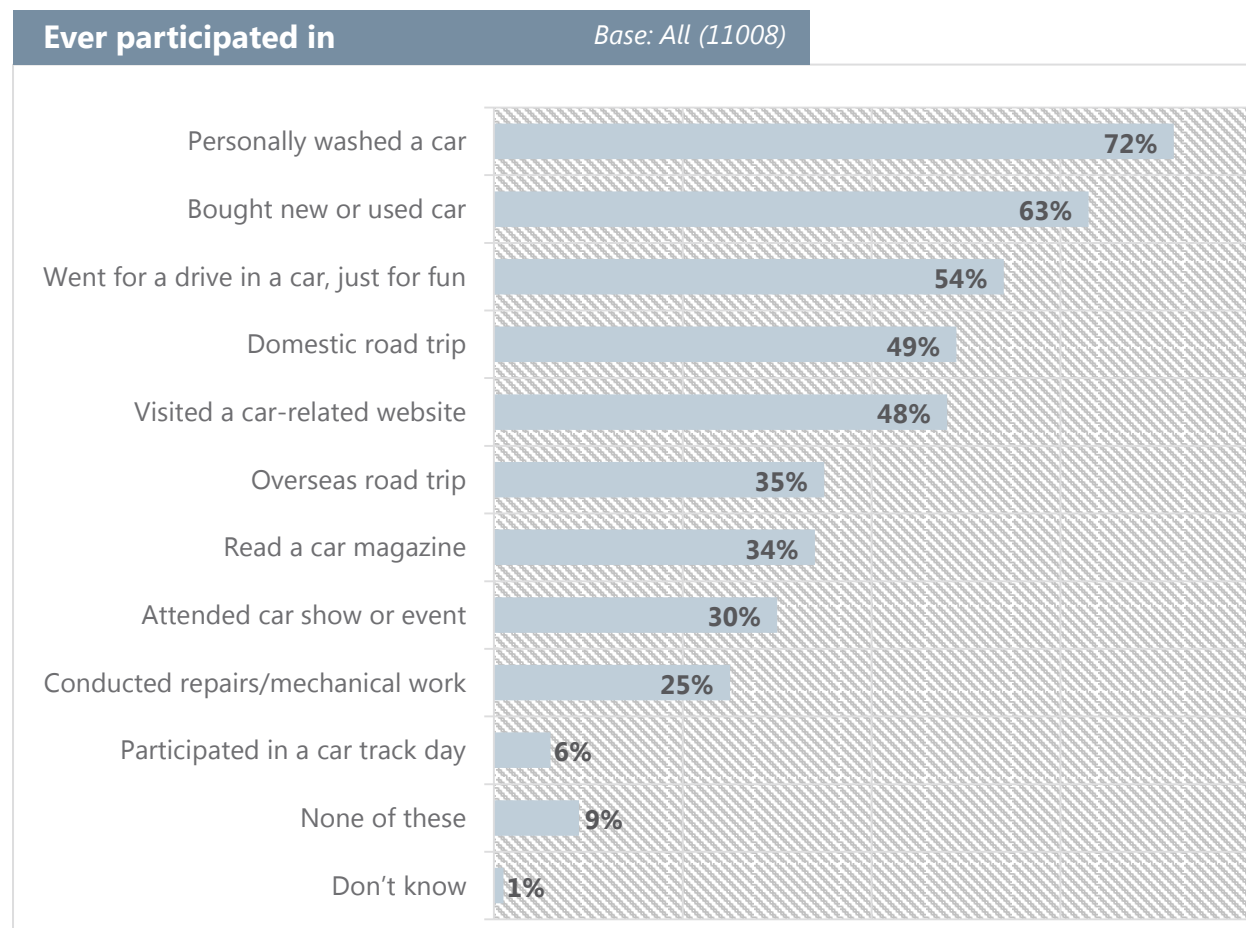
Participation in car related activities














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Over half (54%) have driven for fun, 49% have been on a domestic road trip, 35% on a road trip overseas. Swedes are among the most likely to have engaged in these activities.



Ever participated in *Base: All (11008)*

 (1002)	 (1000)	 (1002)	 (1000)	 (1003)	 (1000)	 (1000)	 (1001)	 (1000)	 (1000)	 (1000)
71%	84%	72%	63%	73%	56%	70%	78%	78%	71%	71%
67%	77%	65%	55%	71%	37%	66%	62%	66%	65%	64%
62%	64%	41%	30%	56%	52%	64%	63%	46%	73%	49%
53%	60%	22%	11%	53%	51%	33%	63%	78%	77%	41%
51%	65%	40%	29%	49%	38%	41%	59%	49%	56%	53%
24%	57%	29%	11%	42%	20%	39%	29%	38%	50%	44%
27%	57%	23%	20%	45%	26%	25%	43%	36%	42%	33%
25%	53%	25%	15%	34%	14%	19%	28%	35%	38%	48%
22%	33%	18%	26%	27%	16%	19%	32%	28%	33%	24%
7%	3%	4%	5%	1%	5%	4%	4%	6%	20%	6%
9%	4%	12%	16%	9%	11%	11%	7%	5%	5%	10%
1%	*	1%	1%	1%	1%	*	1%	*	1%	1%

KEY
-5%<Europe/+5%>Europe

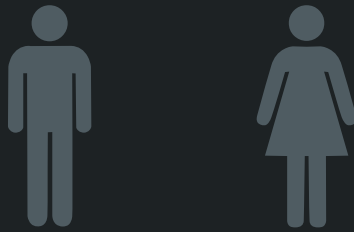


High density



Those in densely populated areas were less likely to have ever been for a drive for fun (**52%**), been to a car show (**29%**), visited a car related website (**46%**), bought a car (**58%**), carried out repairs (**24%**) or personally washed a car (**68%**). However, they were more likely to have gone on a domestic road trip (**51%**)

Gender



Men were more likely than women to have ever done any of the activities mentioned

Age



Younger drivers of 18-24 years and those on a low household income were consistently less likely to have ever done any of the activities listed

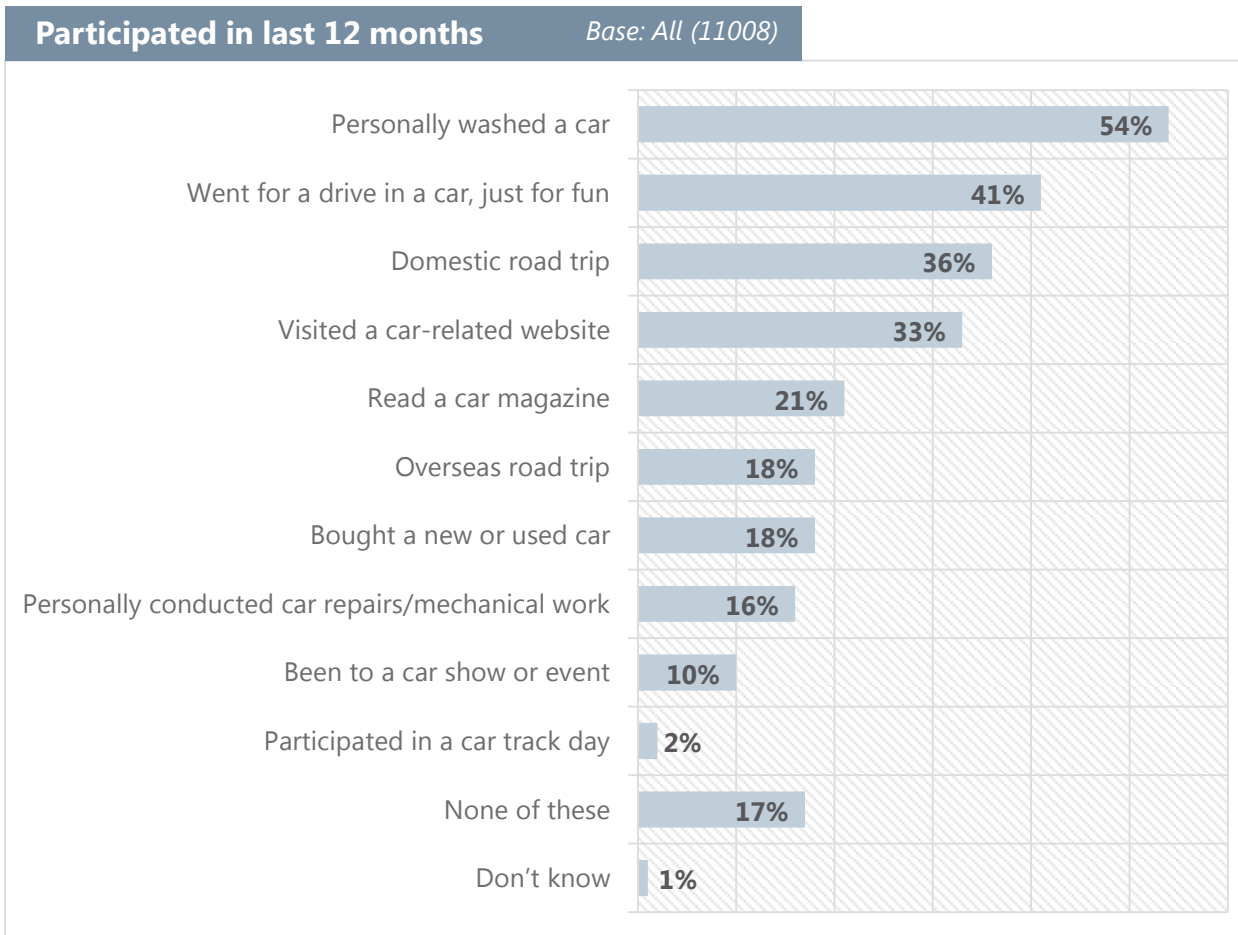
Income














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Two in five have driven for fun in the past year, with over half of those from Sweden (55%) and half (51%) from Poland having done this.



Participated in last 12 months							Base: All (11008)			
 (1002)	 (1000)	 (1002)	 (1000)	 (1003)	 (1000)	 (1000)	 (1001)	 (1000)	 (1000)	 (1000)
46%	63%	56%	58%	47%	47%	48%	66%	67%	45%	53%
43%	44%	29%	24%	38%	44%	48%	51%	37%	55%	34%
37%	41%	14%	7%	36%	44%	21%	51%	66%	56%	28%
34%	46%	26%	22%	32%	30%	26%	45%	32%	38%	38%
13%	38%	13%	17%	27%	20%	12%	27%	22%	20%	20%
8%	31%	16%	6%	22%	13%	22%	14%	18%	16%	28%
23%	21%	16%	21%	15%	14%	17%	17%	13%	19%	16%
13%	18%	12%	21%	13%	12%	10%	22%	18%	18%	16%
8%	18%	7%	6%	9%	8%	3%	12%	11%	11%	19%
2%	1%	1%	2%	*	2%	1%	1%	2%	3%	1%
20%	12%	23%	22%	21%	14%	22%	12%	8%	15%	19%
1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	2%

KEY
-5%<Europe/+5%>Europe

High density



Those in densely populated areas were less likely to have been for a drive for fun (**38%**), visited a car related website (**32%**), bought a car (**15%**), carried out repairs (**14%**) or personally washed a car (**49%**). However, they were more likely to have gone on a domestic road trip (**38%**)

Gender



Men were more likely than women to have done any of the activities mentioned in the last 12 months

Age



Younger drivers of 18-24 were less likely to have taken a road trip both domestic (**28%**) and overseas (**14%**) or to have bought a car (**15%**). Younger drivers were also less likely to have carried out maintenance like washing a car (**47%**) or personally carrying out repairs (**11%**)

Income



Drivers with a high household income were consistently more likely to have participated in the activities listed



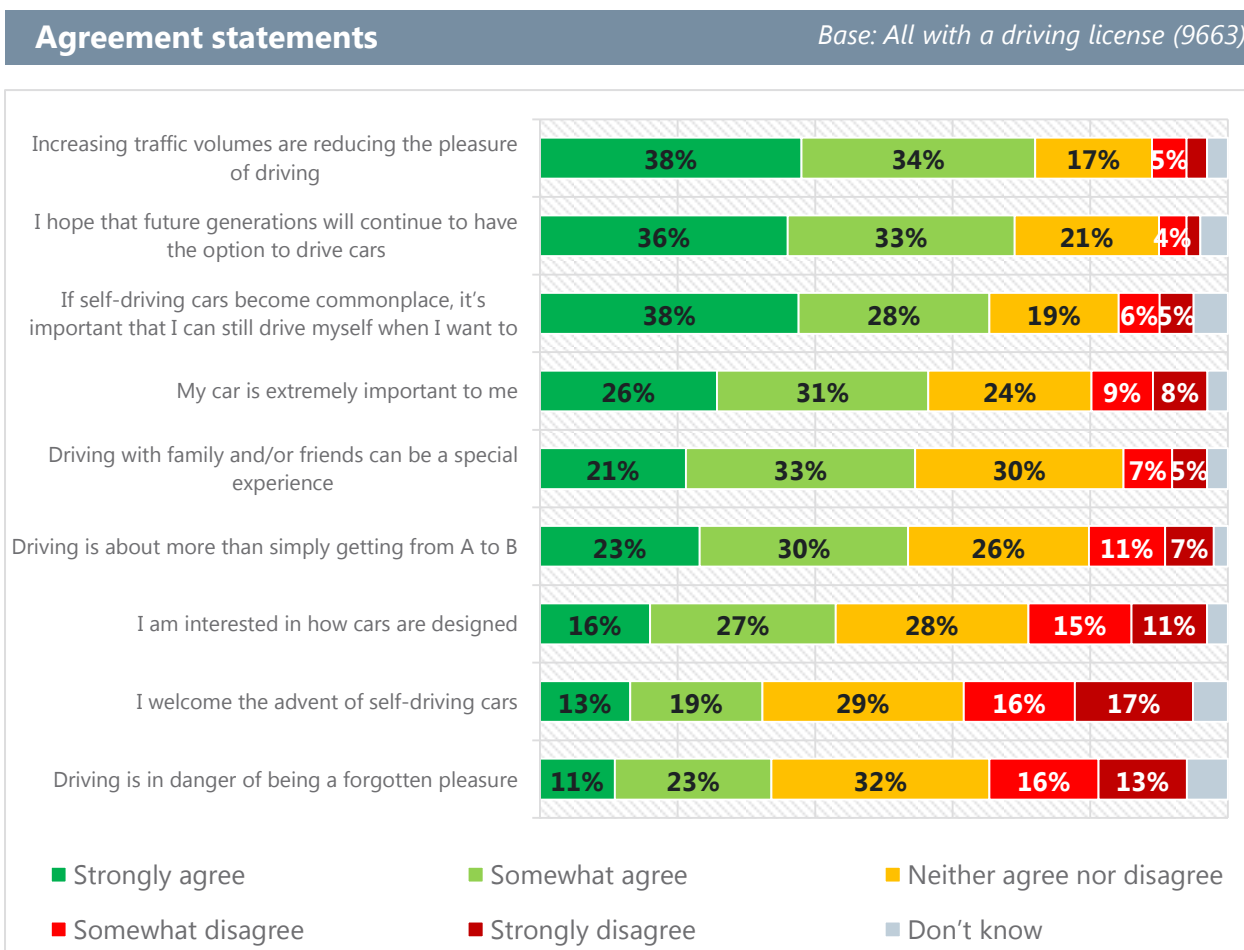
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Aspects of driving: personal experience, current issues, the future



Two-thirds want to retain the option of driving in a world of self-driving cars. Seven in ten (69%) hope this is extended to future generations.



Agreement statements (Agree) *Base: All with a driving license (9663)*

Europe	 (812)	 (878)	 (877)	 (938)	 (907)	 (956)	 (896)	 (842)	 (917)	 (805)	 (835)
72%	78%	71%	81%	78%	76%	71%	61%	70%	68%	67%	76%
69%	70%	67%	68%	71%	72%	63%	69%	74%	66%	70%	68%
66%	71%	71%	65%	67%	71%	59%	62%	71%	62%	64%	67%
57%	68%	53%	58%	53%	57%	58%	51%	66%	55%	57%	49%
55%	55%	58%	44%	40%	59%	62%	42%	66%	62%	62%	55%
53%	55%	46%	53%	50%	46%	59%	52%	66%	56%	53%	50%
44%	39%	46%	41%	40%	42%	49%	35%	43%	57%	44%	44%
33%	29%	34%	30%	25%	30%	43%	25%	35%	45%	30%	32%
37%	32%	38%	34%	47%	35%	41%	29%	43%	35%	29%	37%

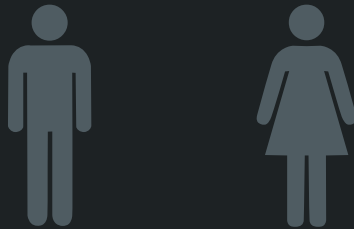
KEY
-5% < Europe / +5% > Europe

High density



Those from densely populated areas were more open to the advent of self-driving cars (**35%**) as are males (**36%**). These drivers were less concerned about still having the option to drive once self-driving cars become widespread (**64%**). This group were the least likely to say that their car is important to them (**52%**)

Gender



Men more likely to say driving is about more than getting from A to B (**55%**). Males were also more likely to be concerned that driving is in danger of becoming a forgotten pleasure (**37%**). Likewise men were more likely to agree that speed cameras (**41%**) and volumes of traffic (**74%**) are spoiling the driving experience. Looking to the future more, men are more likely to say that electric cars will be as satisfying to drive but are also more likely to hope that petrol cars survive in a world where electric cars are more mainstream (**42%**). Females are more likely to consider their car as important to them (**58%**)

Age



18-24 year olds were more likely than any other age group to drive to escape the daily grind (**34%**)

Income



Low income less concerned about traffic volumes (**68%**), high income more interested in car design (**48%**)



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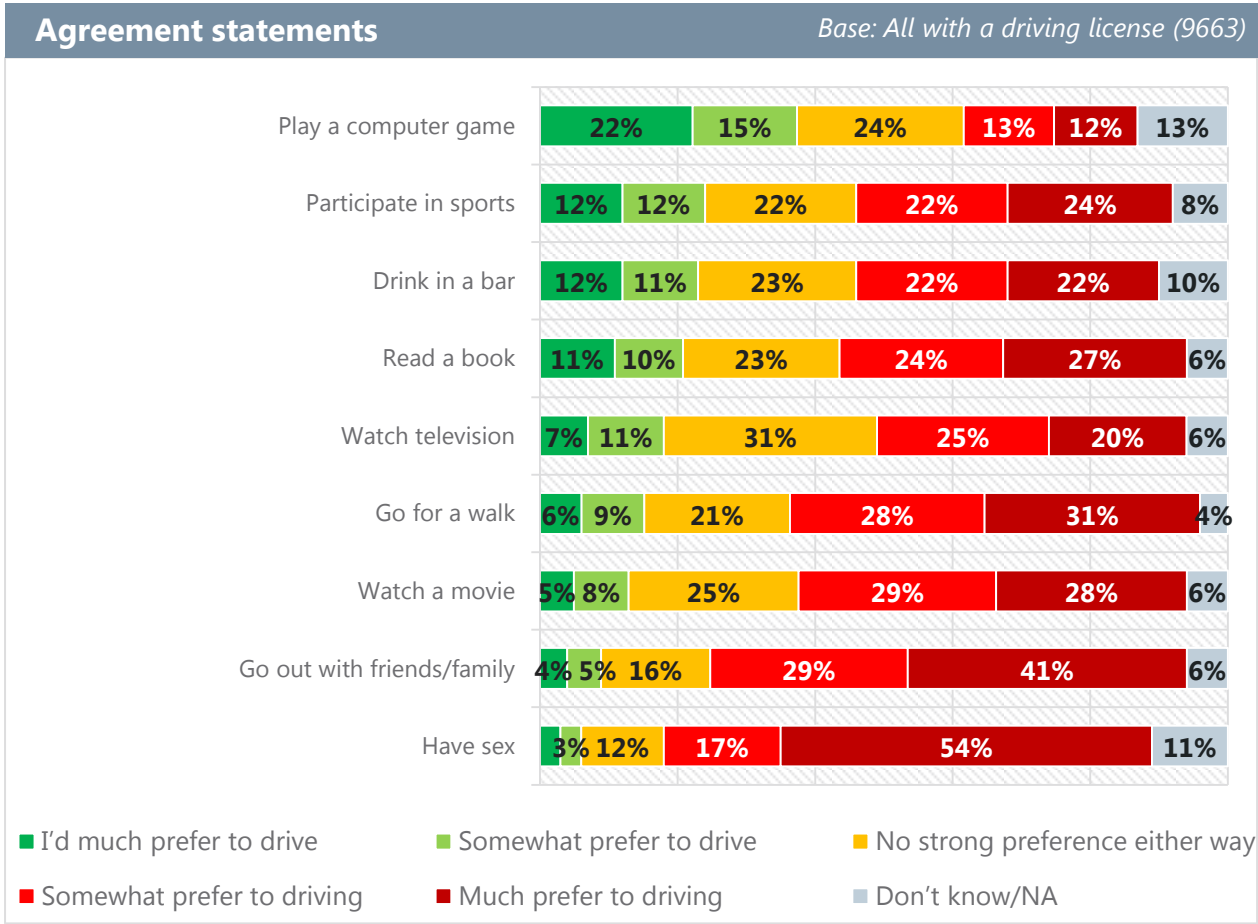
Driving compared to other activities














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There is preference for many activities over driving, most overwhelmingly having sex and going out with friends and family.



Agreement statements (Prefer driving)											Base: All with a driving license (9663)
Europe	 (812)	 (878)	 (877)	 (938)	 (907)	 (956)	 (896)	 (842)	 (917)	 (805)	 (835)
	37%	39%	33%	32%	31%	48%	37%	43%	39%	37%	35%
	23%	37%	18%	23%	21%	22%	22%	22%	25%	25%	19%
	23%	25%	17%	17%	21%	21%	35%	16%	34%	15%	31%
	20%	20%	19%	23%	18%	18%	21%	22%	21%	21%	23%
	18%	16%	15%	11%	17%	13%	31%	13%	31%	22%	14%
	15%	20%	11%	15%	11%	16%	15%	19%	17%	15%	18%
	13%	13%	10%	10%	11%	10%	18%	12%	20%	11%	12%
	9%	11%	5%	9%	7%	8%	13%	9%	12%	9%	8%
	6%	9%	4%	5%	4%	5%	9%	6%	8%	7%	7%

Appendix



Respondent Profile

Population Density

Base: 11008

Low density



20%

Medium density



33%

High density



45%

Not stated

2%

Gender

Base: 11008



50%



50%

Number of cars in household

Base: 11008

No cars



10%

1 car



47%

2 cars



32%

3+ cars



10%

Age

Base: 11008

18-24

13%

25-34

20%

35-44

22%

45-54

23%

55-64

21%

Driven in the last month

Base: 11008

Yes

81%

No but licensed

7%

Not licensed

12%

Thank you.

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