

CANADIAN PRESS/LÉGER MARKETING

**Canadians
and Cars**

Report



1.0 Study Highlights

- Rising gas prices will influence the purchase of new cars.

Question : *In the past two years, gas prices have increased significantly. Will this have an impact on the type of vehicle you will purchase in the future?*

n=1254 Canadian Car Owners	YES	NO	Don't know/ Refusal
Canada	62%	36%	2%

Question : *Due to rising oil prices, have you modified your habits when it comes to the use of your vehicle, like for example, driving slower, cutting down on mileage, car pooling, using public transport more often, etc.... ?*

n=1254 Canadian Car Owners	YES	NO	Don't know/ Refusal
Canada	41%	58%	0%

- Canadians prefer American cars.

Question : *Which type of automobiles do you generally prefer? Is it... ?*

n= 1254 Canadian Car Owners	... North-American	...European	... Asian	No preference	Don't know / Refusal
Canada	54%	8%	25%	11%	2%

- Gas consumption, comfort and roominess are the most popular features in a car.

Question : *For you personally, what is the most important feature that you look for in an automobile? Is it...?*

n=1254 Canadian Car Owners	Gas Consumption	Comfort	Performance	Storage Room	Exterior Design
Canada	30%	27%	16%	8%	5%

- Governments should financially encourage the purchase of cars built or assembled in Canada.

Question : *Do you think governments should spend money on programs or subsidies to encourage Canadians to buy automobiles built or assembled in Canada ?*

n=1503 Canadian Car Owners	Yes	No	Don't know/ Refusal
Canada	57%	35%	7%

- More than 8 out of 10 Canadians own or lease an automobile.

Question : *Do you own or lease an automobile ? IF SO : Is it...*

n=1503	Total
... a family sedan (Jetta, Camry, Taurus, Accord, etc.)	29%
... a compact sedan or hatchback (Civic, Protégé, Sentra, Elantra, Focus, Neon, etc.)	22%
... a mini-van	14%
... a pick-up truck	13%
... an SUV or sports utility vehicle (Jeep, Explorer, Pathfinder, CRV, etc.)	9%
... a sports car	5%
Other	2%
Do not own or lease a vehicle	16%

2. Results

2.1 Rising gas prices will influence the purchase of future automobiles.

62% of Canadians who own or lease an automobile indicated that gas price increases over the past two years would have an impact on the kind of vehicle they purchased in the future, while 36% said they wouldn't have any impact.

Rising gas prices would also influence 66% of those respondents who owned or leased sedans or subcompacts and 69% of those aged 45-54. However, they wouldn't have an impact on 42% of those with higher salaries, 46% of retirees and 47% of those over 65 years of age.

However, rising gas prices have caused 41% of drivers to change their driving habits (driving more slowly, cutting down on mileage, using public transport, etc.), while 58% have not changed their habits at all.

51% of those with a family income below \$40,000 changed more of their driving habits, while 69% of those with higher salaries, 63% of professionals and 64% of Quebecers did not change them at all.

Question : *In the past two years, gas prices have increased significantly. Will this have an impact on the type of vehicle you will purchase in the future ?*

n=1254 Canadian Car Owners	YES	NO	Don't know/Refusal
Under \$20,000	65%	30%	5%
\$20,000 - \$39,999	68%	29%	2%
\$40,000 - \$59,999	68%	31%	1%
\$60,000 and over	57%	42%	1%
Canada	62%	36%	2%

Question : *Due to rising car prices, have you modified your habits when it comes to the use of your vehicle, like for example, driving slower cutting down on mileage, car pooling, using public transport more often, etc.?*

n=1254 Canadian Car Owners	YES	NO	Don't know/Refusal
Under \$20,000	48%	50%	3%
\$20,000 - \$39,999	52%	47%	0%
\$40,000 - \$59,999	45%	55%	0%
\$60,000 and over	31%	69%	0%
Canada	41%	58%	0%

2.2 Canadians Prefer American Cars

54% of Canadian drivers prefer American cars while 25% have a preference for Asian cars, 8% for European models and 11% do not have any preferences.

American cars were also preferred by 74% of pick-up truck drivers, 64% of mini-van owners, 57% of men, 59% of anglophones, 59% of Ontarians, 68% of Prairie residents, 66% of manual workers and 63% of retirees.

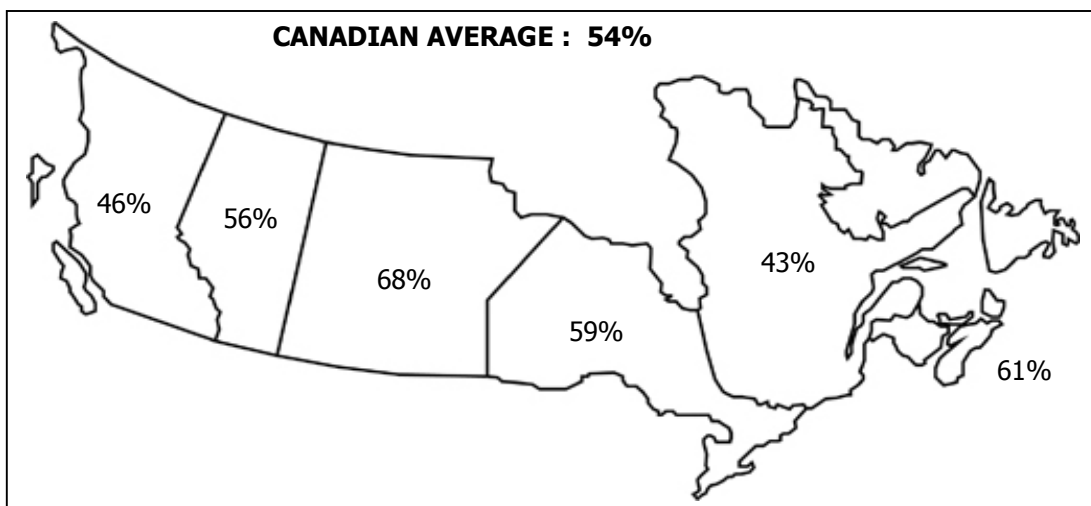
Asian cars were the number one choice of those who owned or leased compact sedans or hatchbacks (35%), 37% of francophones, 36% of anglophones, 41% of Quebeckers, 33% of British Columbians, 31% of those with higher incomes and 35% of university graduates.

As for European cars, they were especially attractive to 12% of those aged 18-34, 10% of Ontarians and 12% of university graduates.

Question : *Which type of automobile do you generally prefer? Is it... ?*

n=1254 Canadian Car Owners	... North American	...European	... Asian	No Preference	Don't know / Refusal
Atlantic Provinces	61%	9%	7%	19%	4%
Quebec	43%	8%	41%	5%	2%
Ontario	59%	10%	21%	10%	0%
Prairies	68%	4%	13%	11%	4%
Alberta	56%	3%	18%	21%	3%
British Columbia	46%	5%	33%	15%	1%
Canada	54%	8%	25%	11%	2%

Percentage of Canadians Who Prefer North-American Cars



2.3 Lower gas consumption, comfort and roominess are the most popular features in a car

30% of those who own or lease automotive vehicles consider lower gas consumption as the most important feat characteristic in a car. This is particularly true of 44% of those who own or lease compact sedans or hatchbacks.

However, 27% are more interested in comfort and roominess, particularly 33% of those who own or lease family sedans.

In contrast, 16% of drivers are more concerned with performance, acceleration and engine power, while 8% are more interested in storage capacity and 5% by exterior design.

Those who own or lease sports cars fell within the middle range for all features, except for design which was the most important for 13% of them.

Question : *For you personally, what is the most important feature that you look for in a car? Is it... ?*

n=1254 Canadian Car Owners	Gas Consumption	Comfort	Performance	Storage Capacity	Exterior Design
Owns or leases a family sedan	28%	33%	16%	4%	5%
... a compact sedan or hatchback	44%	19%	14%	5%	5%
... a mini-van	29%	34%	10%	11%	2%
... a pick-up truck	25%	21%	17%	18%	4%
... an SUV or sports utility	21%	36%	12%	10%	5%
... a sports car	32%	15%	17%	6%	13%
TOTAL	30%	27%	16%	8%	5%

2.4 Governments should provide financial incentives to those who purchase automobiles built or assembled in Canada

According to 57% of Canadians, governments should spend money on programs or subsidies to encourage Canadians to buy automobiles built or assembled in Canada. However, 35% did not share this view.

Quebeckers were more amenable to this option with 75% of respondents there, probably affected by the upcoming closure of the GM Boisbriand plant, approving of government subsidies. This opinion was shared by 68% of those with a family income below \$20,000.

However, the West does not seem to share this view quite as strongly since only 42% of Albertans and 47% of British Columbians favoured this kind of subsidy.

Question : *Do you think governments should spend money on programs or subsidies to encourage Canadians to buy automobiles built or assembled in Canada?*

n=1503	Yes	No	Don't know/ Refusal
Atlantic Provinces	59%	32%	9%
Quebec	75%	23%	2%
Ontario	54%	37%	9%
Prairies	50%	39%	11%
Alberta	42%	42%	16%
British Columbia	47%	45%	9%
Canada	57%	35%	7%

2.5 More than eight Canadians in ten own or lease an automobile

83% of Canadians currently own or lease a car. 35% of these have a family sedan, 26% a compact sedan or hatchback, 17% a mini-van, 15% a pick-up truck, 10% an SUV or sports utility, 6% a sports car and 3% another kind of automotive vehicle.

Question : *Do you own or lease a car? If SO, is it...?*

n=1503	Total	MEN	WOMEN
YES	83%	87%	81%
NO	16%	13%	19%

Question : *Do you own or lease a car? If SO, is it...?*

n=1254 who own or lease	Total	MEN	WOMEN
...a family sedan	35%	34%	35%
... a compact sedan or hatchback	26%	24%	29%
... a mini-van	17%	17%	17%
... a pick-up truck	15%	20%	11%
... an SUV or sports utility	10%	10%	11%
... a sports car	6%	6%	5%
Other	3%	2%	3%

Note : The vertical total may exceed 100% since respondents could mention more than one type of automobile.

3. Methodology

This study was conducted by Leger Marketing through telephone interviews among a representative sample of 1503 English- or French-speaking Canadians, 18 years of age or older.

The interviews were conducted from our Montreal and Winnipeg call centres between May 22 to 26, 2002. Up to ten call-backs were made in the case of non-response.

Using data from Statistics Canada, the results were weighted according to geographic location, gender and language spoken at home to ensure a sample representative of the entire Canadian adult population. In the end, the maximum margin of error obtained for a sample of 1503 respondents is of ± 2.6 , 19 times out of 20.