



COCKPIT FOR THE PLANET

1 Mobility: key to adopting a more sustainable lifestyle

Changing the way we travel or commute is as important as changing the way we consume or eat...



MOBILITY IN THE TOP 3



% of respondents who place changing mobility in the TOP 3 priorities in order to adopt a more environmentally responsible lifestyle

74%



71%



69%



66%



But...

89% of Chinese drivers have never bought a second hand car

Western drivers are not willing to give up owning a car:

59%

58%

51%



% of respondents not willing to give up owning a personal car

2 Eco design: an essential aspect for a more responsible car



Eco-design* is at least as important as the vehicle's engine



75%



62%



65%



82%



% of respondents who think that eco-design is more important or at least as important as the vehicle's engine



Low emission, Recycled and/or recyclable materials



Can be repaired or refurbished to extend lifespan



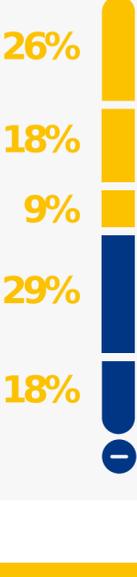
Energy-efficient



Locally produced

*Eco-design in the automotive industry is a sustainable production model to make car interiors more environmentally responsible.

3 All drivers are not willing to put in the same level of effort



Ready to make a lot of efforts



Ready to make some efforts



Ready to make only financial efforts



Not proactive



Reluctant to make any effort

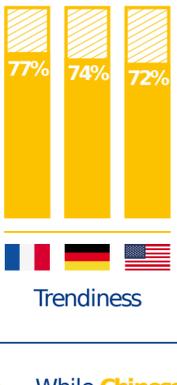
27%

24%

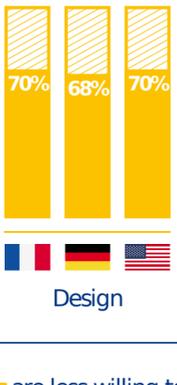
Concessions for a more sustainable vehicle: the trade off is not the same for each country

For all countries, no concessions about: safety, lifespan, comfort

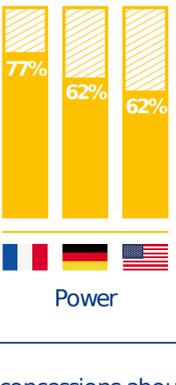
6/10 Western drivers at least are willing to make concessions about trendiness, design and power of the car:



Trendiness



Design



Power

While Chinese drivers are less willing to make concessions about these 3 dimensions but are more willing to pay more to have a more environmentally friendly car:

59% Willing to buy a more expensive car



49% Willing to have a car more expensive to use / maintain



4 The challenge: make eco-design accessible & affordable

Consumers recognize their individual role in making an environmentally responsible choice.

9/10



think that car manufacturers have an important role to play in the development of more environmentally friendly cars.

% of respondents who think that eco-design should be standard i.e. on all cars, without exception and included in the sale price of the vehicle

81%



72%



67%



66%



2/3



at least would like eco-design for vehicles to be standard.

Economic arguments are seen by Western drivers as more effective to convince them to buy an eco-designed car.

3rd The reduced ecological footprint is the third most effective driver for all countries.



Proofs of saving during use

1



Nor more expensive to buy

2



Reduced ecological footprint

3



Nor more expensive to buy

1



Proofs of saving during use

2



Reduced ecological footprint

3



While for Chinese drivers regulations enforced by authorities as well as the physical experience inside the vehicle interior are more effective.

Standards, regulations

1

Physical sensations

2

Reduced ecological footprint

3

