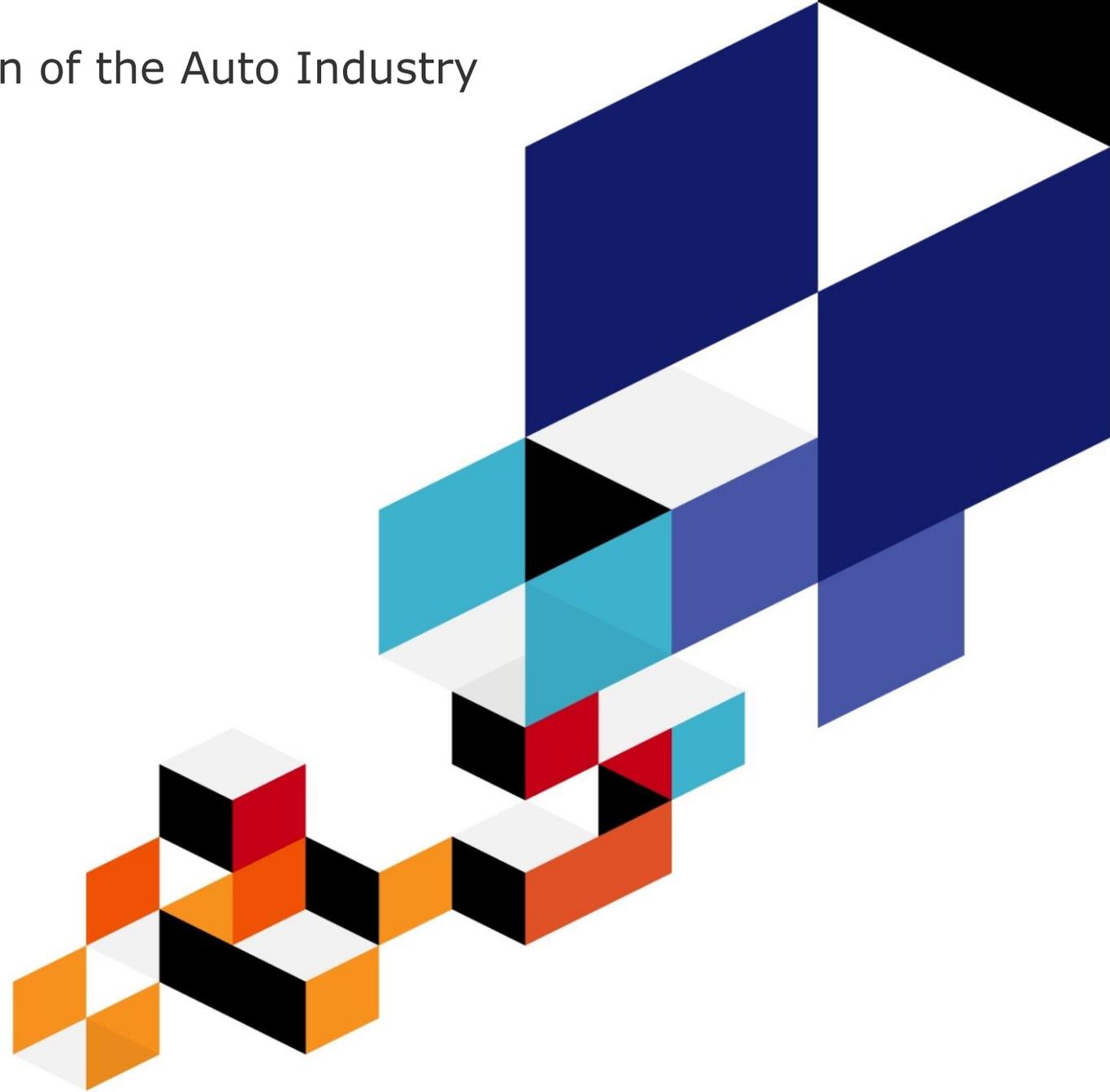


# Global Image and Reputation of the Auto Industry

## Frankfurt Motor Show

*16 September 2015*



**TNS Sofres**  
Global image of the auto industry

© TNS



A bit of context...

**During recent history, public attitudes towards the auto industry have shifted up and down in response to global events and, no doubt, by the media coverage of the issues those events have raised.**

**In early 2015, the International Organization of Motor Vehicle Manufacturers (OICA) decided it was time to take an accurate measure of the state of the industry's reputation internationally.**

**For the first study of its kind in terms of subject and scale, the OICA commissioned the Automotive team at TNS Sofres to conduct a survey amongst the general public in 18 countries, with the goal of capturing consumers' attachment to the automobile and their image and opinion of the sector overall.**

**Fieldwork for the study was conducted between February and April 2015.**



**TNS Sofres**  
Global image of the auto industry

© TNS

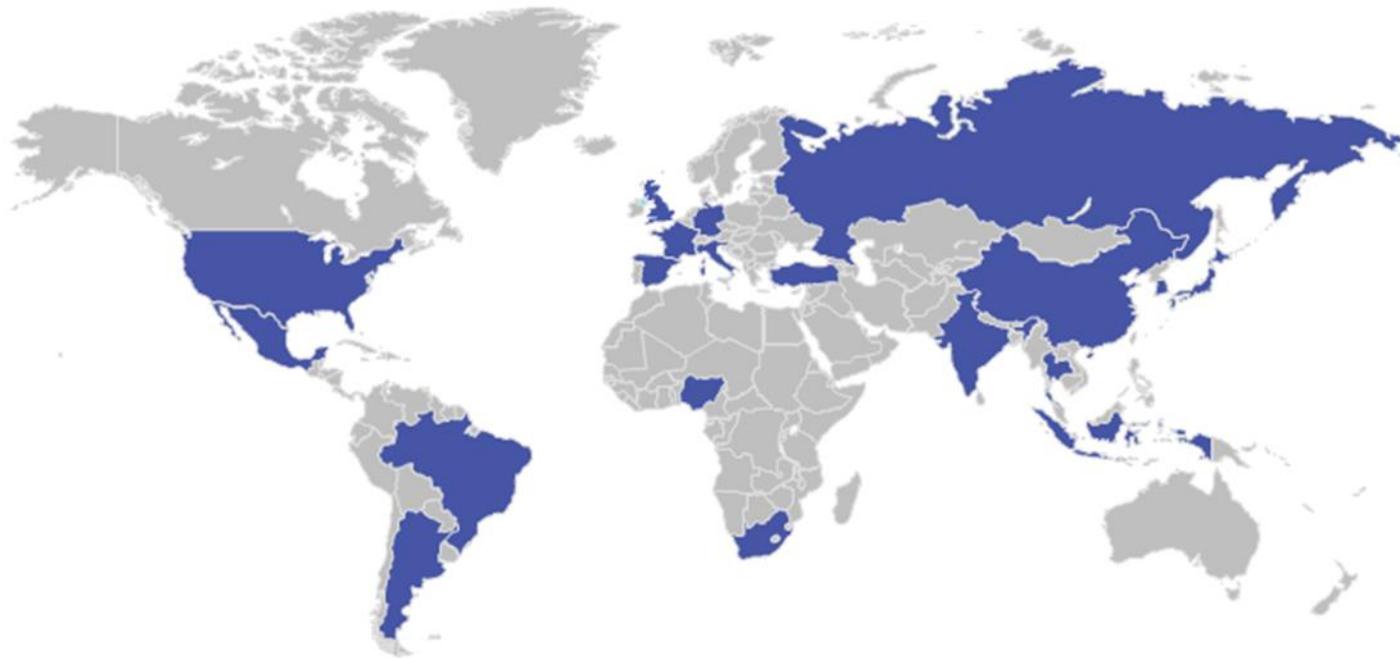


# An international first, to measure the reputation of the auto industry around the globe

**18 countries** in the scope / Over **14, 000 interviews** conducted **between February & April 2015**



**76%**  
of WW car sales



## Sample



- 800 interviews per country
- 18 target markets (76% of WW car sales)
- **General public 18+** in developed markets
- **Online population 18+** in developing markets

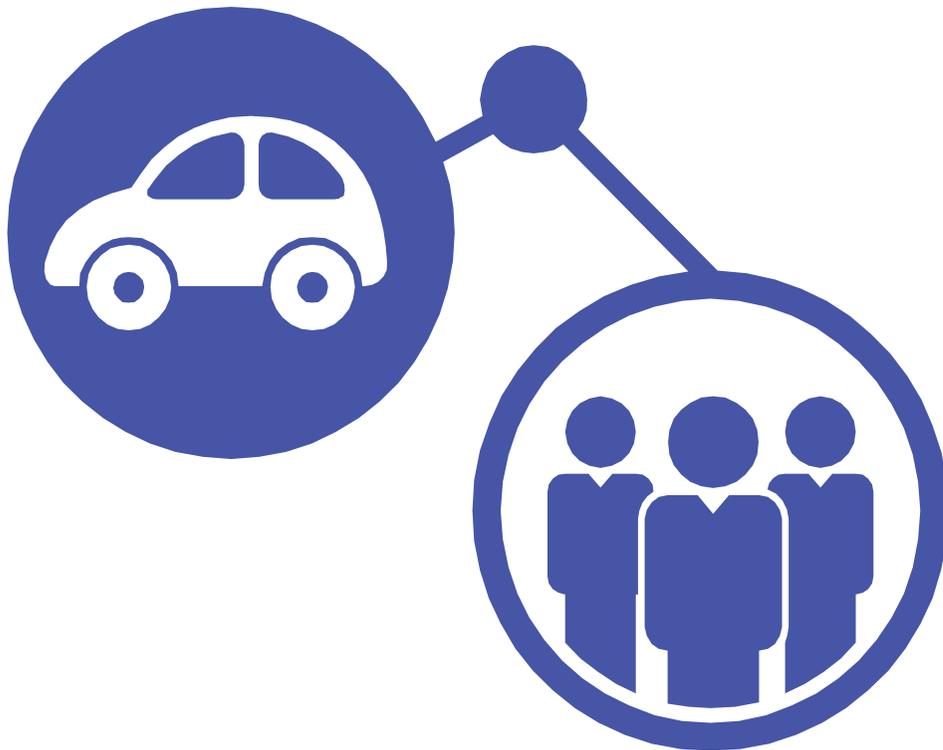
## Methodology



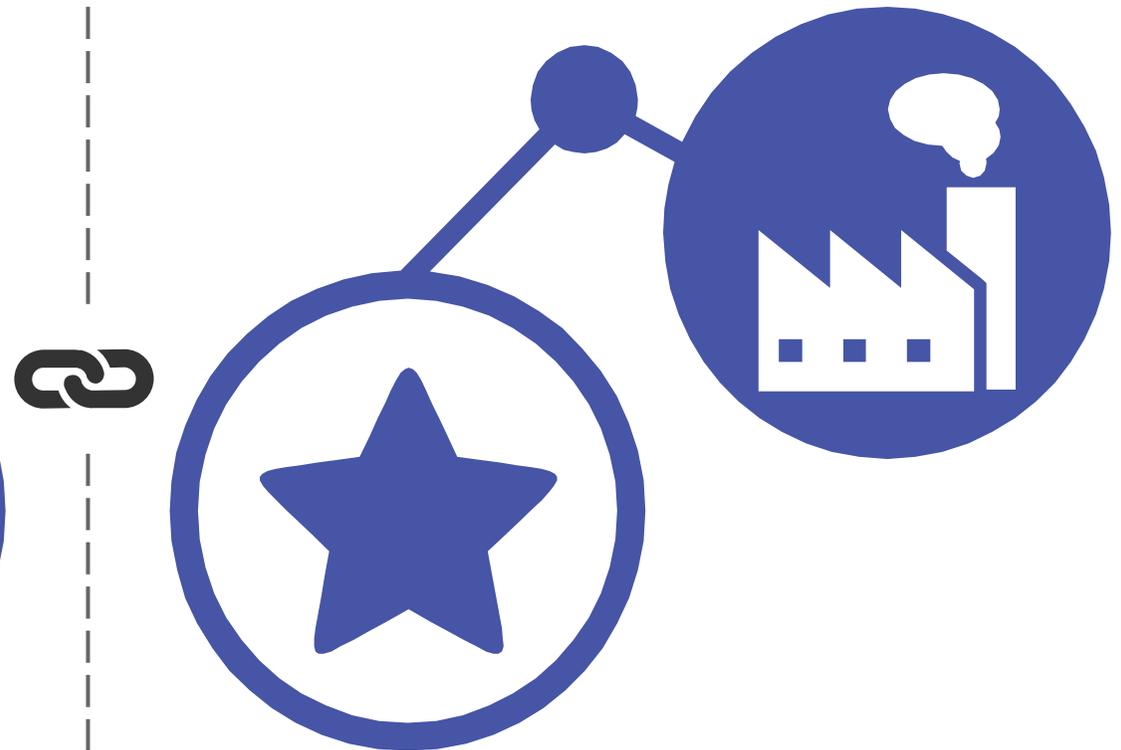
- Online interviews
- 15-minute long questionnaire
- Kantar LSR access panel

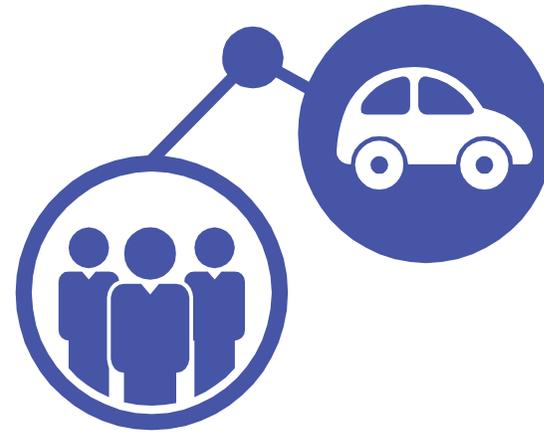
# Two major topics covered by the research

## Attachment to cars



## Image & reputation of the industry

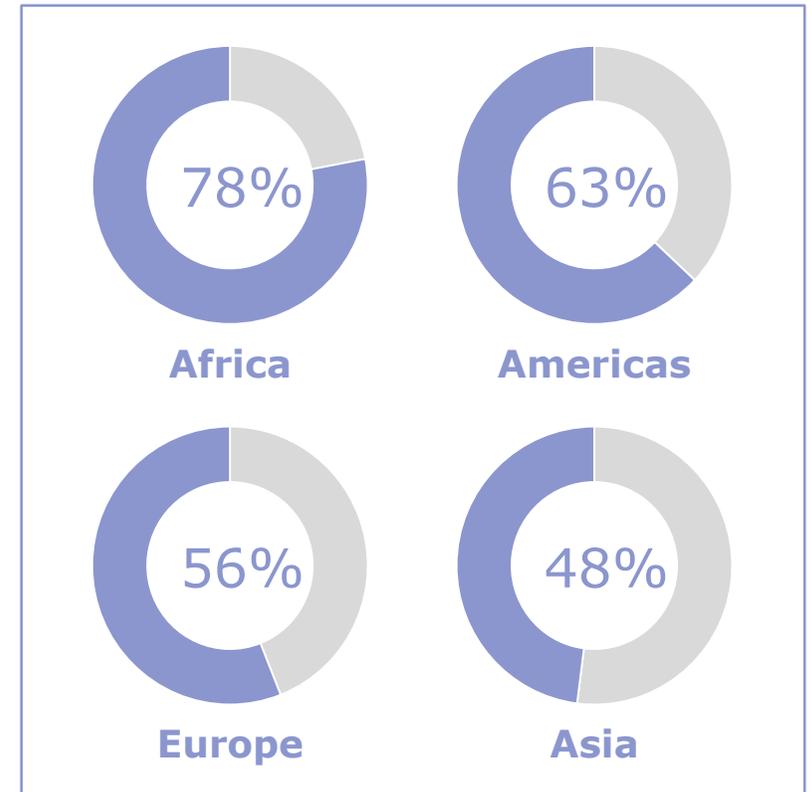
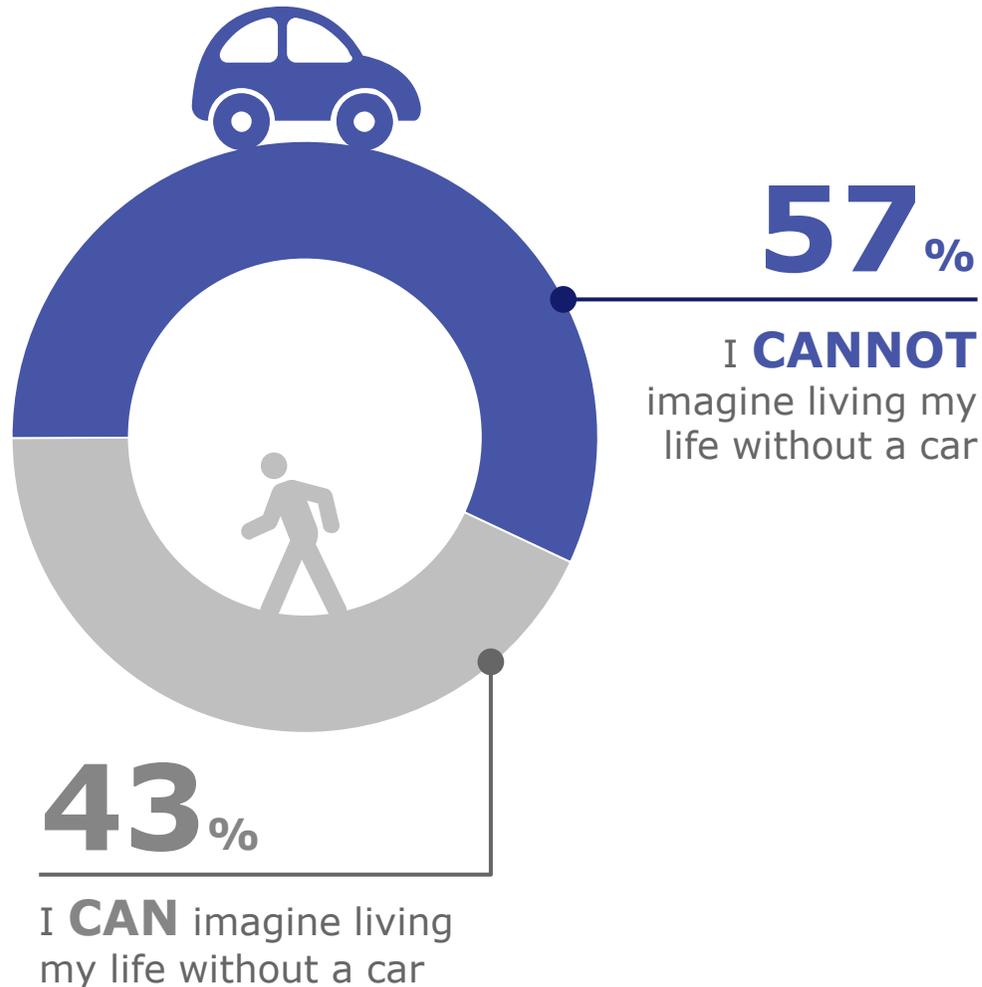




What does the automobile represent for consumers today ?

Today, the global majority could not imagine living their lives without a car.

## Attachment to cars



Q: Please select which of the following statements best corresponds to the way you feel.



**TNS Sofres**  
Global image of the auto industry

© TNS

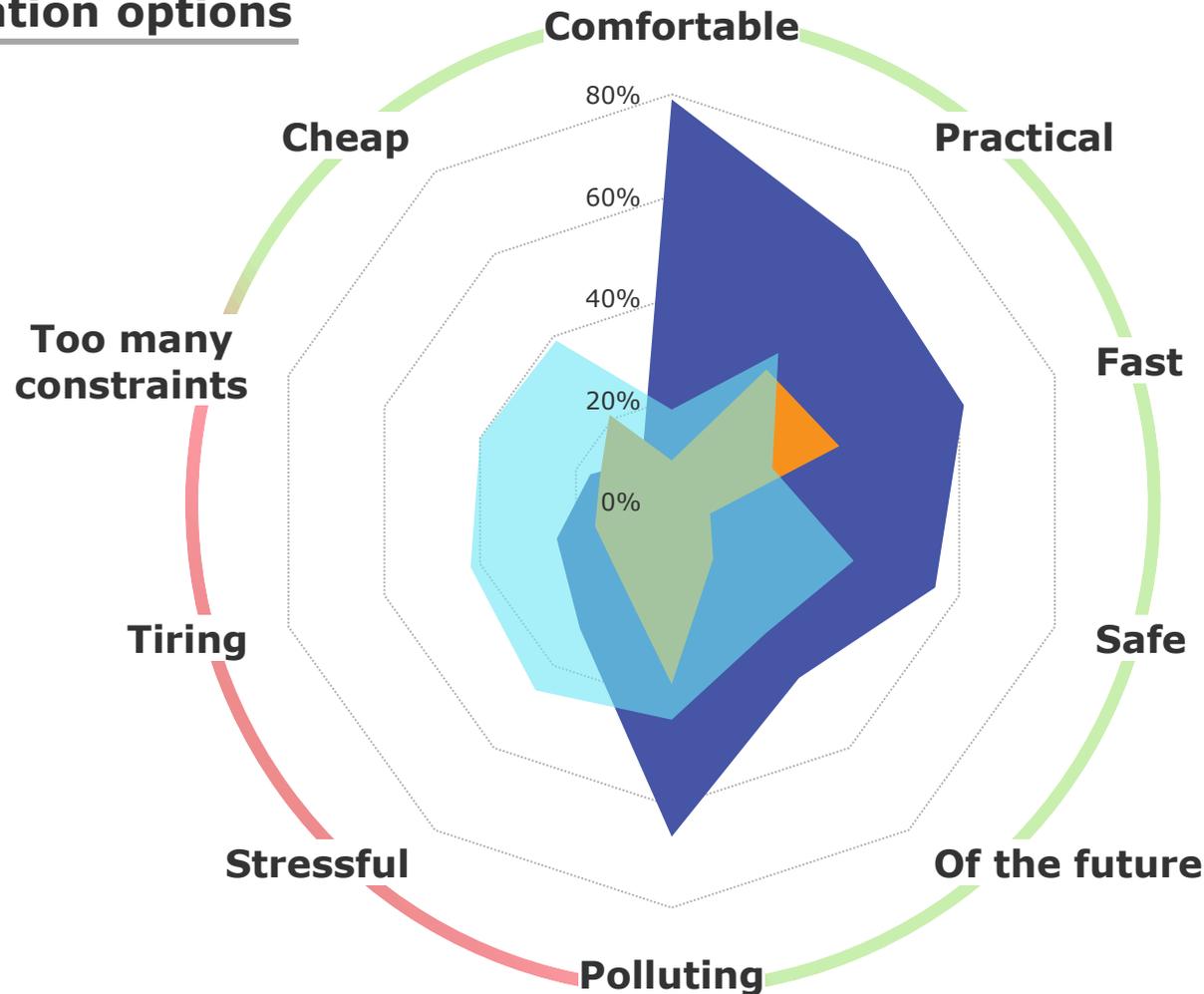
Survey conducted between February and April 2015



In the context of a daily journey, the automobile has an unrivaled image of comfort and efficiency compared to alternatives.

## Profile of transportation options

-  Car
-  Moto
-  Public Transportation



Q: Please indicate to what extent you think each attribute applies to a daily journey taken with the following means of transportation.



**TNS Sofres**  
Global image of the auto industry

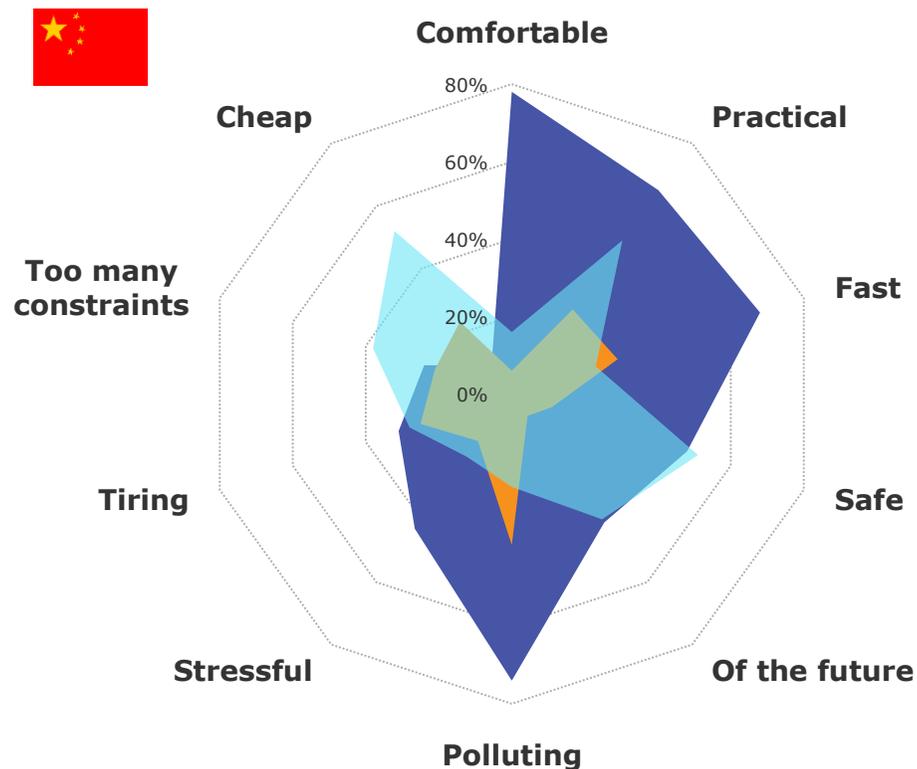
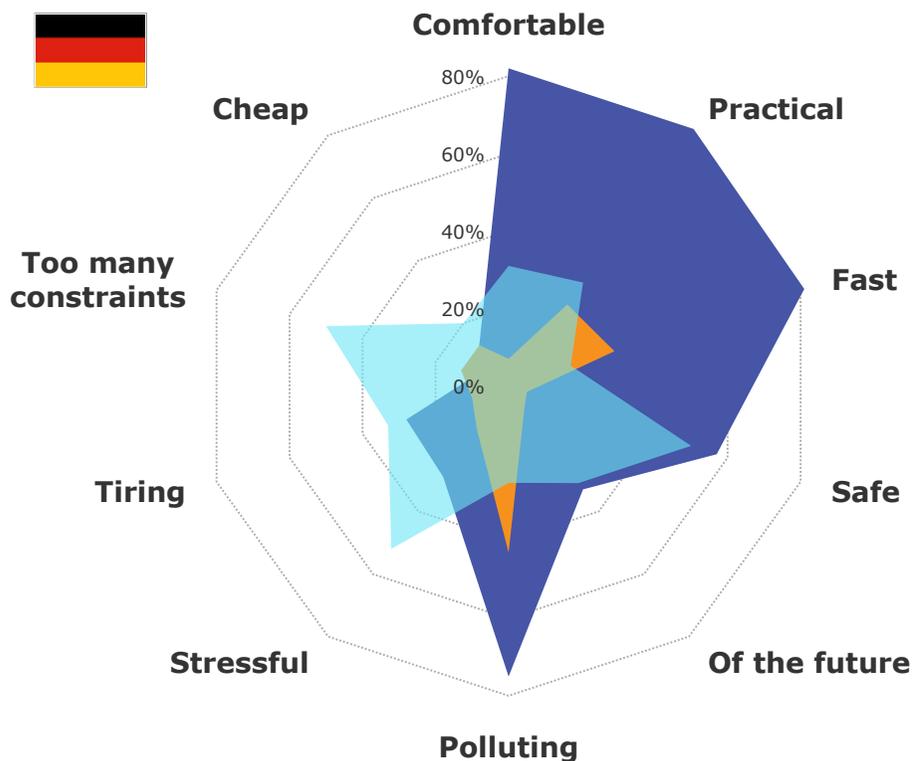
© TNS

Survey conducted between February and April 2015



...and this profile is a relative point of convergence across markets, regardless of their level of development.

## Profile of transportation options



Q: Please indicate to what extent you think each attribute applies to a daily journey taken with the following means of transportation.



**TNS Sofres**  
Global image of the auto industry

© TNS

Survey conducted between February and April 2015

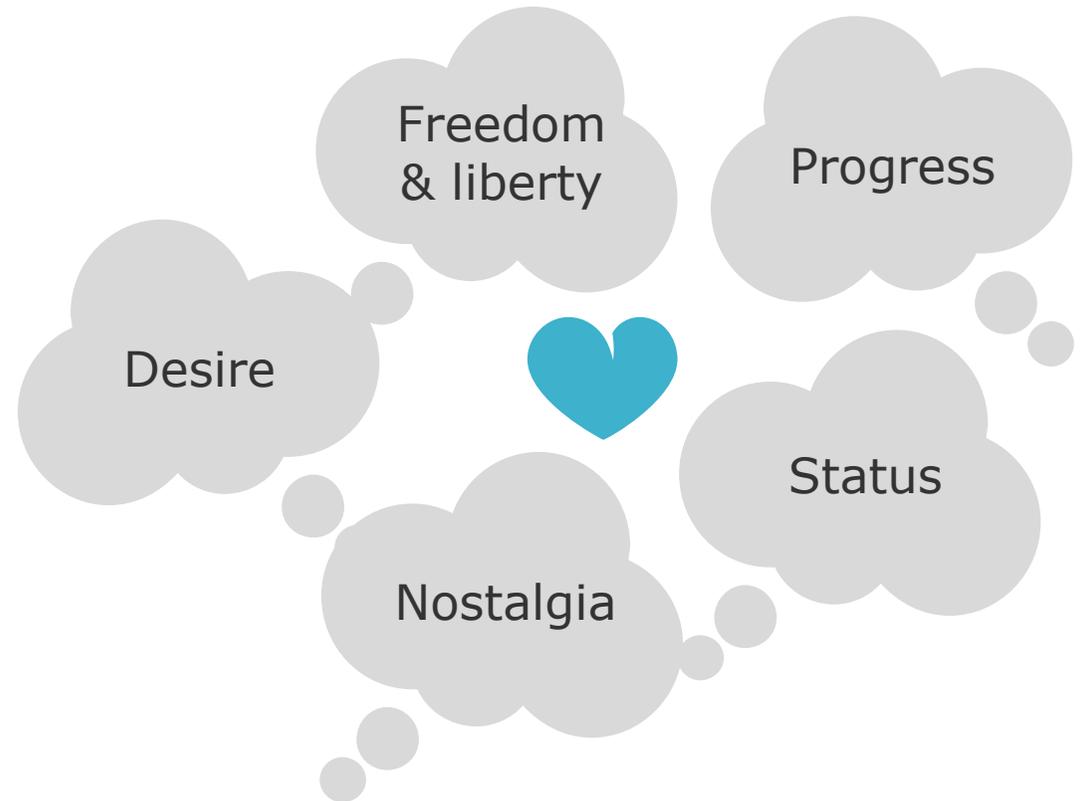
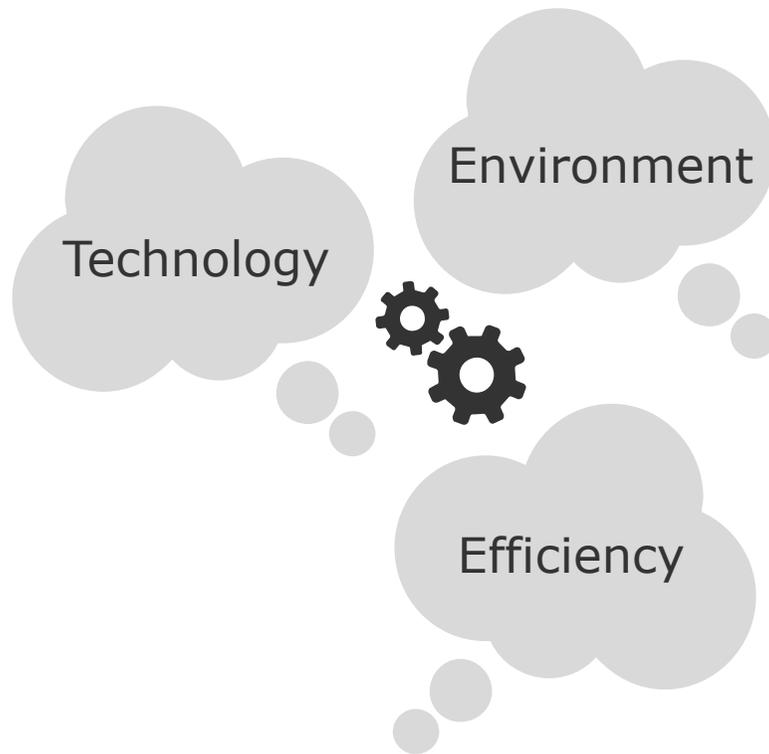


But there are two dimensions to take into account when measuring consumers' image of and attachment to the automobile.



## Functional

## Emotional



The top statements that constitute the public's image of the automobile reveal a strong emotional bond to cars and a persistent desire for ownership.

## Top image items associated with the automobile

The **FIRST CAR** one owns is **VERY SPECIAL**

*Top 2 Box (Agree strongly + slightly)*



It's important to **OWN MY OWN CAR**



It's always nice to see a **BEAUTIFUL CAR** drive by



The car is one of humanity's **GREATEST ACHIEVEMENTS**



Cars are the **MOST EFFICIENT** means of getting around



A car is a symbol of **PERSONAL FREEDOM** and **LIBERTY**



*Q: The following list contains some statements commonly associated with cars. Please indicate to what extent you agree with each.*

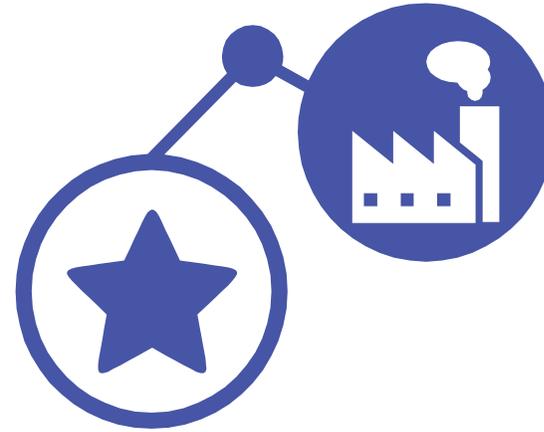


**TNS Sofres**  
Global image of the auto industry

© TNS

Survey conducted between February and April 2015





What is the image and reputation of the auto industry today ?

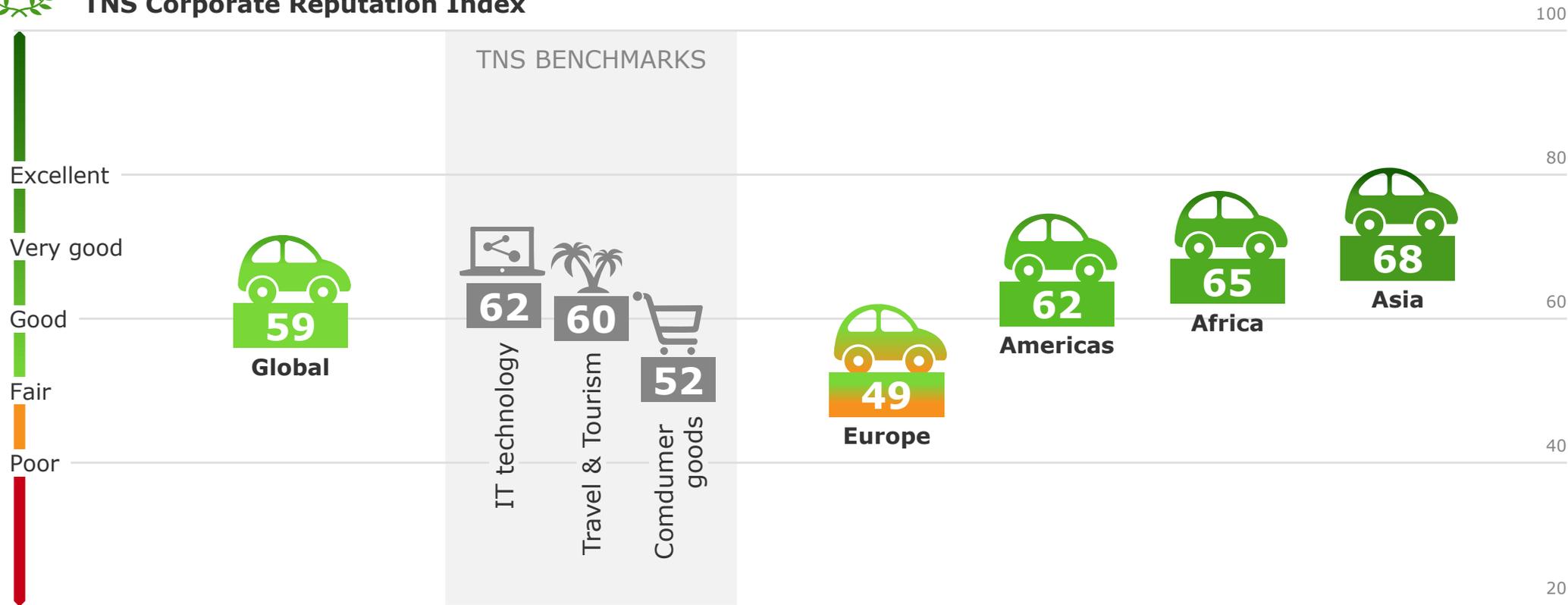
The TNS corporate reputation index takes into account 5 important dimensions.



A sector whose reputation is in good health, with some disparities between mature and emerging markets.



## TNS Corporate Reputation Index



TNS TRI\*M Corporate Reputation Index (not % score) is based on 5 key indicators: Overall stated reputation, personal opinion of the industry, trust in the industry in the long run, industry's product and service quality, industry's perceived economic and financial success. Theoretically, the TRI\*M Index is calculated on an 'open' scale. In practice, more than 80% of all TRI\*M Corporate studies have got an Index between 20 and 76 (General Public target).  
 Benchmark (General Public 18+ - All industries - World - based on 942 000 interviews): 48



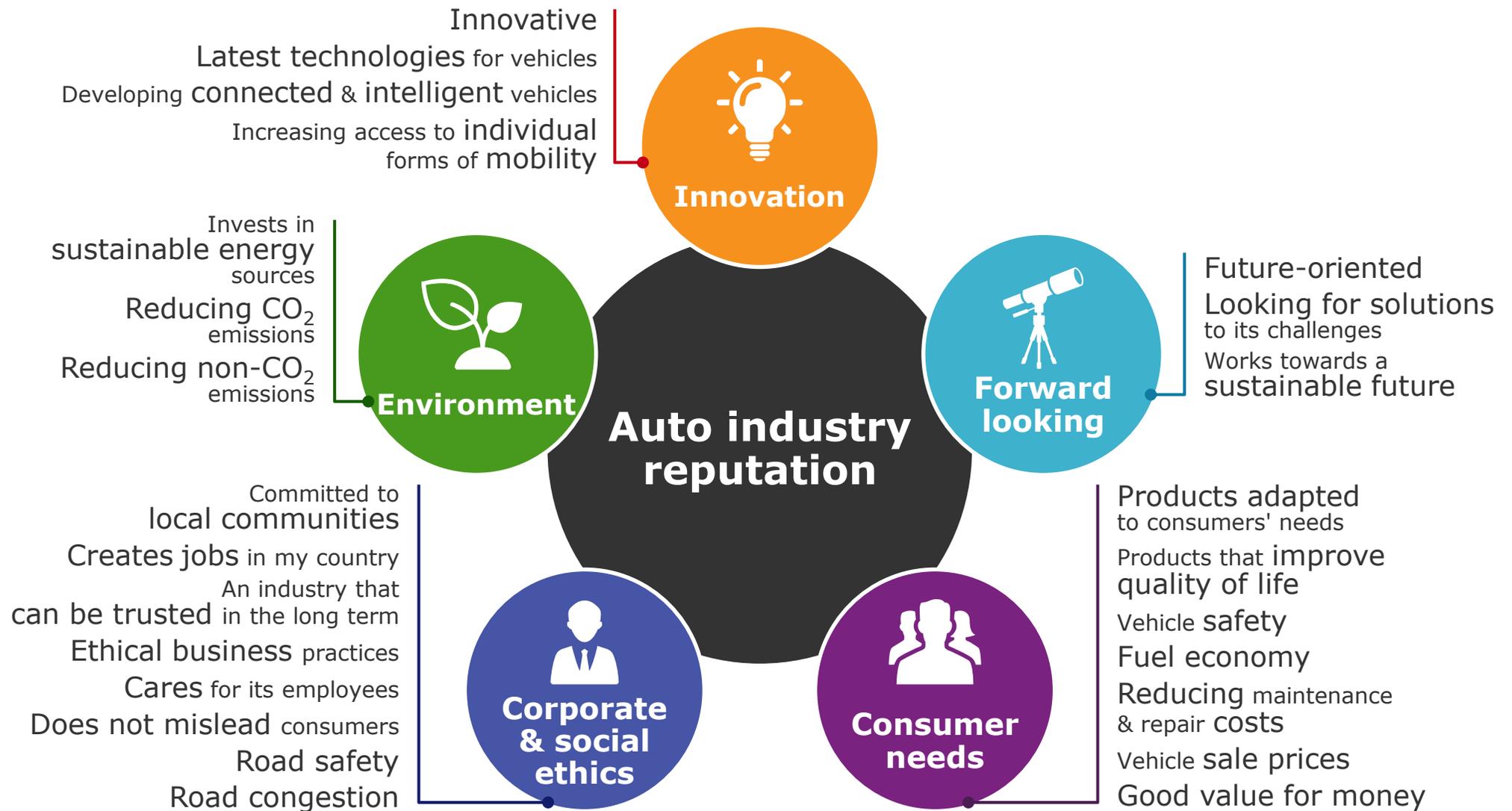
**TNS Sofres**  
 Global image of the auto industry

© TNS

Survey conducted between February and April 2015



Many diverse factors contribute to the auto industry's reputation today, and our study covers those dimensions, down into the details.



# A surprising mix of factors that drive the auto industry's reputation today...

Latest technologies for vehicles

Developing connected & intelligent vehicles

Innovative



## Top drivers of industry reputation

Future-oriented

Looking for solutions to its challenges



Products adapted to consumers' needs

Products that improve quality of life



An industry that can be trusted in the long term



And on these challenges that most impact its reputation, global public opinion finds that the auto industry has a strong capacity to face them.

**Latest technologies for vehicles**

**81%**

**Developing connected & intelligent vehicles**

**78%**

**Innovative**

**77%**



**Good performance rating**   
(Excellent + very good + good)

**Future-oriented**  
**79%**

**Looking for solutions to its challenges**  
**74%**



**Products adapted to consumers' needs**  
**78%**  
**Products that improve quality of life**  
**76%**

**An industry that can be trusted in the long term**  
**73%**



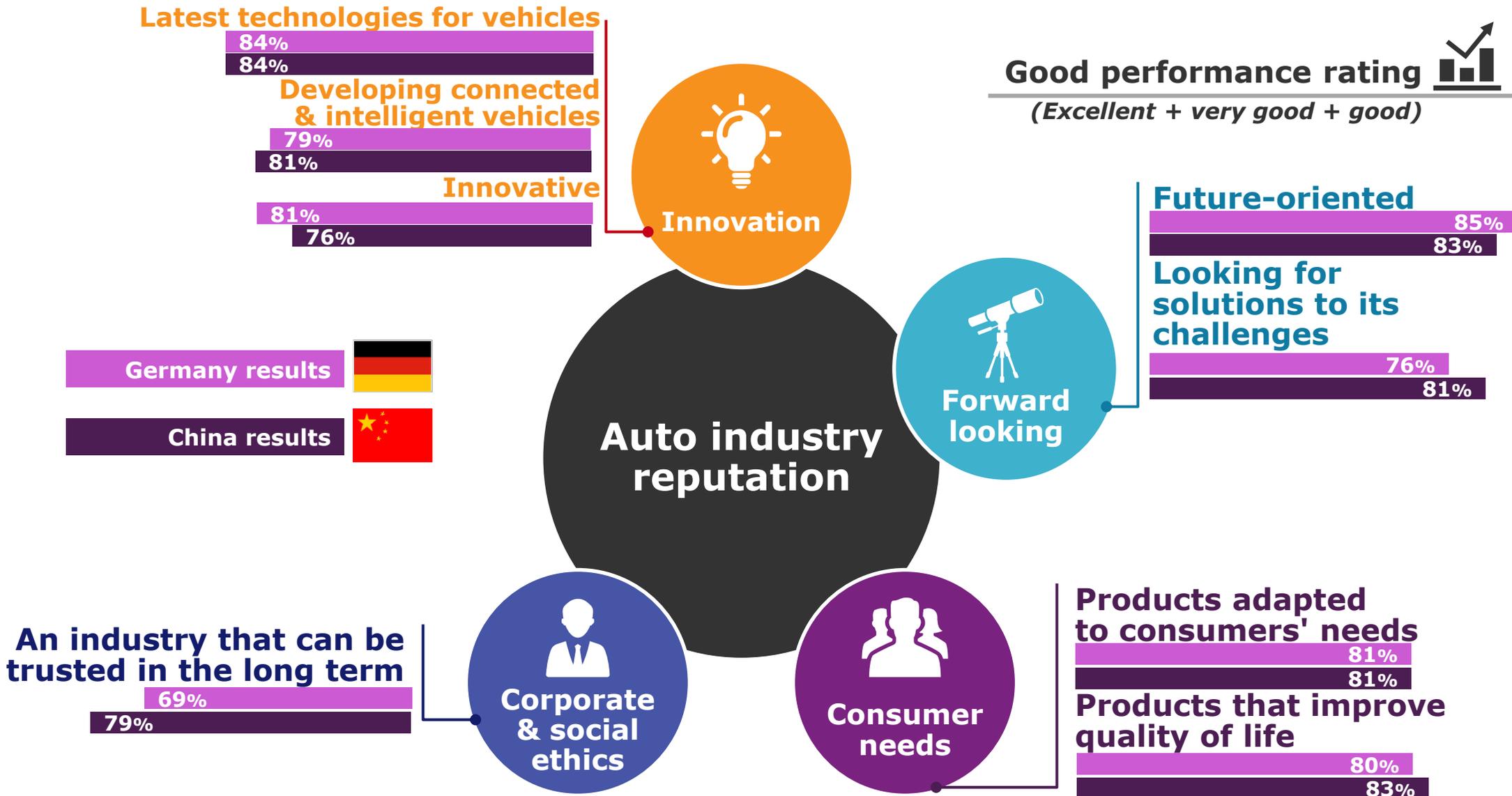
**TNS Sofres**  
Global image of the auto industry

© TNS

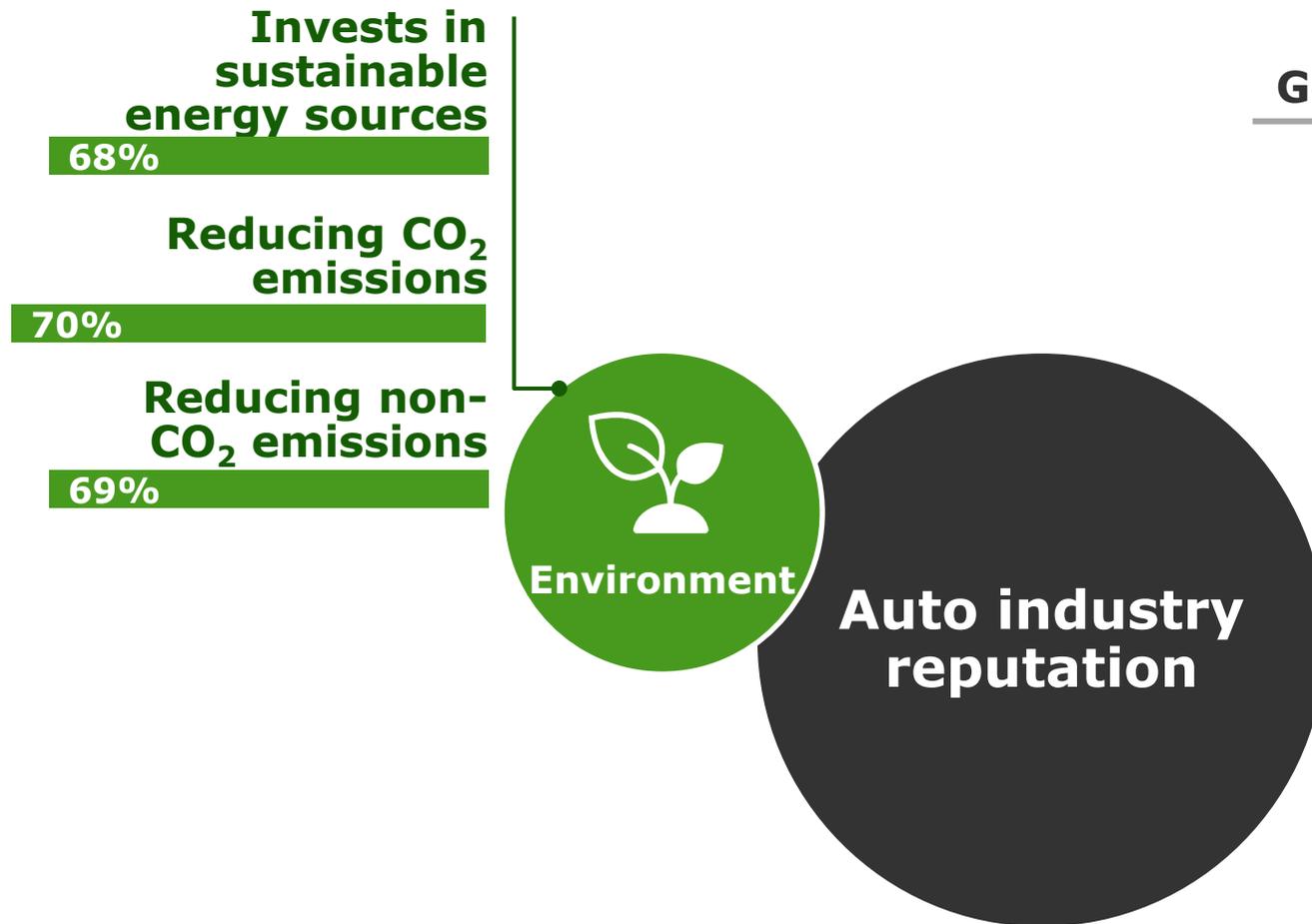
Survey conducted between February and April 2015



With similar good results on these important drivers across most markets.



On environmental issues that traditionally receive media coverage, global public opinion has gotten the message that the industry has made progress.

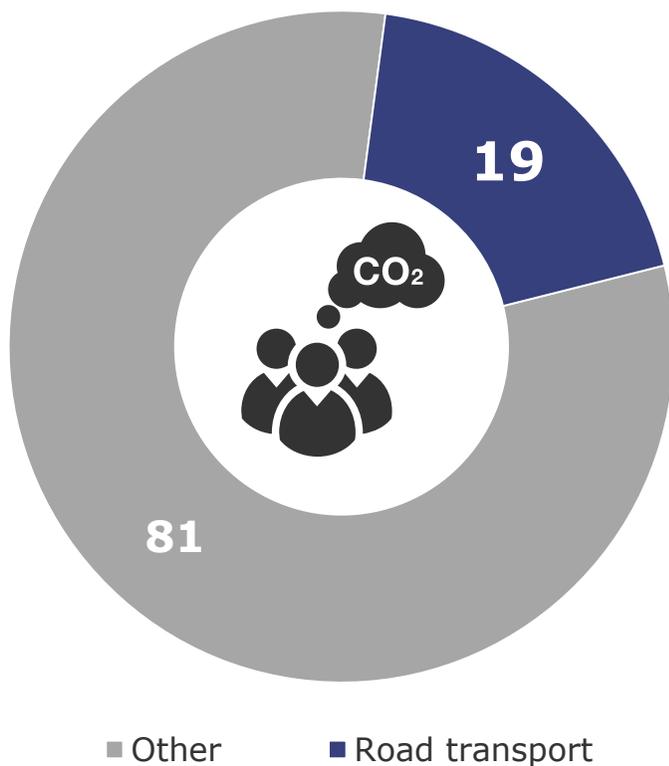


**Good performance rating**   
(Excellent + very good + good)

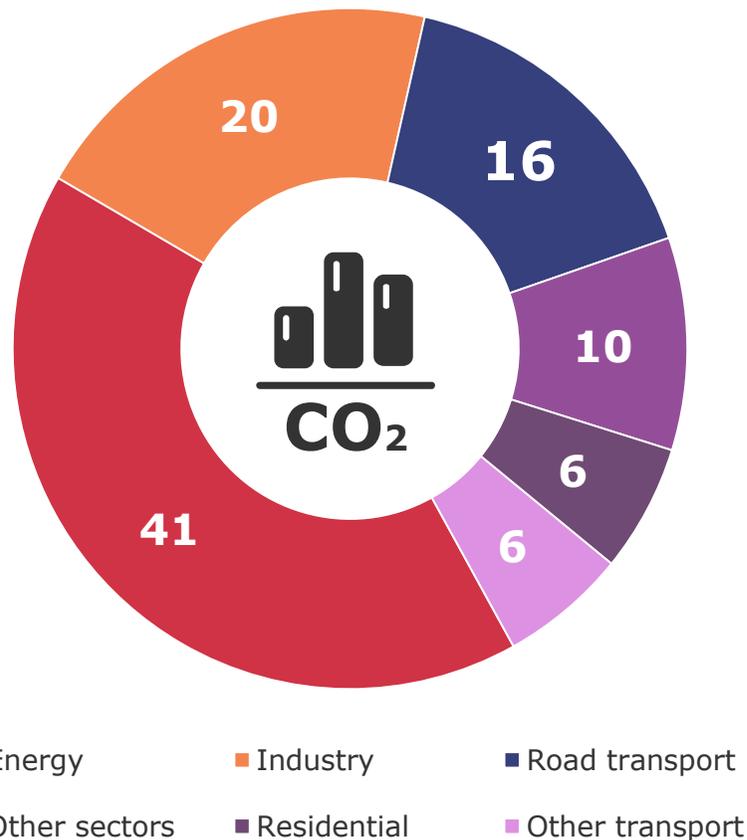
What's more, public opinion has an accurate view of vehicles' contribution of to global CO2 emissions.

## Vehicle contribution to global CO2 emissions

What **respondents** say



What the **stats** say



Q: Please indicate what percentage of global CO2 emissions you think each of the following sectors is responsible for.

Source: International Energy Agency

To conclude ...



A strong **emotional bond with the automobile** amongst consumers and a **global desire for ownership**



An industry with a **good public perception**, even more so in developing markets



Thanks to its **capacity to face those challenges** that most contribute to its reputation today



But ....current **expectations for the auto industry are very high.**

Beyond being able to face specific challenges that impact its reputation in a given market, the public expects a **concrete vision for the future** if the industry is to maintain a positive perception.