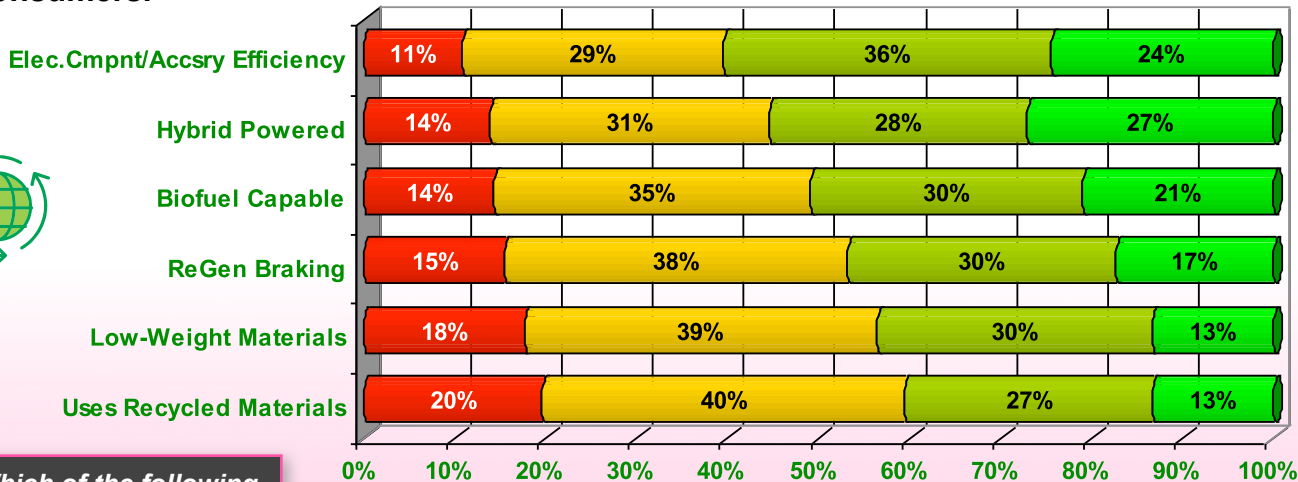


AUTOMOTIVE GREEN: LOOKING PAST MPG

“Green” is the topic de jour in the auto industry and everywhere. TNS surveyed 2,500 consumers on how “green” will drive their future vehicle purchases. We sought to focus on green’s **power of the mind** by asking about “green” elements sought on the **next new vehicle purchase other than miles-per-gallon**.

The strongest results were for **electric component and accessory efficiency**. While this covers many things from lighting to power windows to drive-by-wire, it may represent a **key opportunity** for automakers and component suppliers in terms of **sourcing and marketing**. Somewhat surprising are the results for **low-weight materials**, which implicitly include trendy **carbon fiber and aluminum**. And despite trailing in these results, the presence of **recycled materials** was reported as definitively or probably consider by **40% of consumers**.



Which of the following "green" elements beyond mpg ratings will you consider?

■ Will not Consider ■ May Consider
■ Probably Consider ■ Definitely Consider

The next step is understanding consumers’ willingness to consider green **within the context** of other attributes, including creating a **consideration hierarchy**. This would also reveal which green attributes are **nice to haves vs. need to haves**. Nice to haves may serve as a tie-breaker. Need to haves actually help **shape the consideration set**. The results will help automakers and suppliers understand how to **position and price** green elements—including whether to make **standard or optional** and how to **package** green with other options.

TNS is the world’s foremost provider of custom research and analysis, combining in-depth industry sector understanding with world-class expertise in the areas of new product development, segmentation and positioning research, brand and advertising research and stakeholder management. For additional information on these results contact Lincoln Merrihew of TNS Automotive (Lincoln.Merrihew@tns-global.com) or Melanie Mumper of TNS Marketing (Melanie.Mumper@tns-global.com)