



True Green

What defines “green” automotive consumers? There are many shades of being green, and those shades shift back and forth, depending on the various economic, socioeconomic, and environmental pressures that consumers experience. Self-proclaimed “true green” consumers, while strong in resolve, are few in number. In contrast, the vast majority of consumers express environmental awareness and concern, yet they are cautious in acting on these interests when considering vehicle choices.

The *2011 Green Automotive Study* includes an assessment of consumer attitudes regarding green leaning attributes such as commitment to environmentally friendly products, recycling, and emission reductions, among others. For the purposes of this assessment, consumers have been segmented into three groups. Consumers who express universal association with these attributes are referred to as Advocates, which are contrasted with Moderates (consumers who do not entirely embrace green-related initiatives) and Resisters (consumers who do not embrace any green initiatives). The goal of this assessment is to provide insight into the motivations and behaviors that define these groups.

Profiling Advocates, Moderates, and Resisters

While Advocates (21% of the study sample), Moderates (66%), and Resisters (13%) share many similarities, there are a few demographic areas where differences exist. For instance, Advocates as a group tend more toward females who are in their 30s or are younger. Moderates skew fairly average from a gender perspective but are far more likely to be in their 40s and 50s. Resisters are predominately male and have an equal age distribution among those in their 30s or younger and those in their 40s and 50s.

In addition, while consumers in each of these groups are likely to be college educated, Advocates are much more likely to have an advanced college degree. Furthermore, Advocates’ median household income is slightly higher than that of Moderates and Resisters.

Green Regions

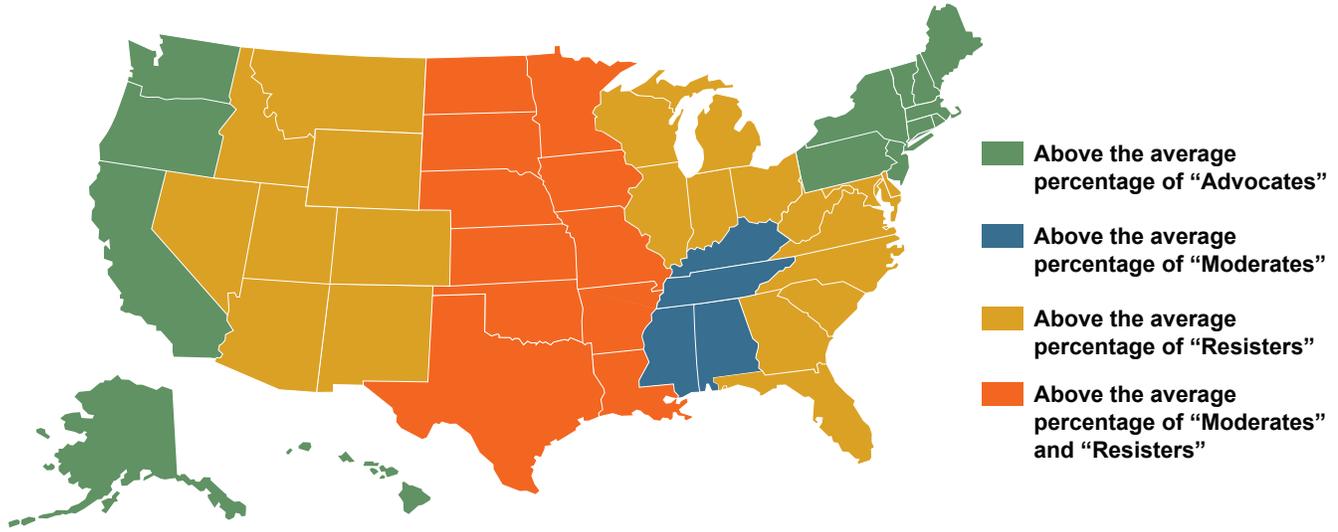
The vast majority of consumers in each group live in suburban areas. However, urban living is more common among Advocates than in the other two groups, while rural living is more common among Moderates and Resisters.

Self-proclaimed “true green” consumers, while strong in resolve, are few in number.

This *Power Insight*, excerpted from the inaugural *J.D. Power and Associates US Green Automotive Study*,SM focuses on the most important aspects of the alternative powertrain vehicle market. The study includes information from J.D. Power’s extensive resources and data, perspective based on consumer data, forecast and social media information, and opinions from the company’s experts in this market.

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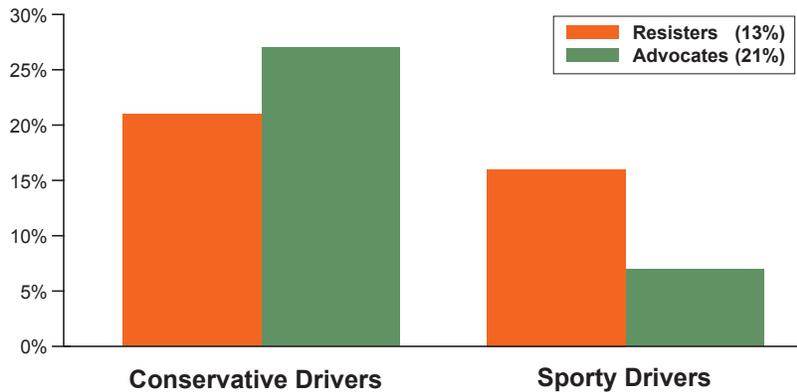
The map illustrates the regional composition of all three groups. Contrasting each group by region and comparing it to the average percentage of each group identifies the regions where there is a higher mix of each group. As a result, there is a greater proportion of Advocates in the New England, Mid-Atlantic and Pacific regions, whereas there is a higher-than-average representation of Resisters in the Mountain, South Atlantic, and East North Central regions. The rest of the nation skews more Moderate or is divided among both Moderates and Resisters.



Green Driving

Driving style also shows some separation between Advocates and Resisters. When asked to categorize how they typically drive, Advocates are more likely to consider themselves a conservative driver. Given the economic and environmental motivation of Advocates, a conservative driving style helps support these interests.

Driving Style by Group



Source: J.D. Power and Associates

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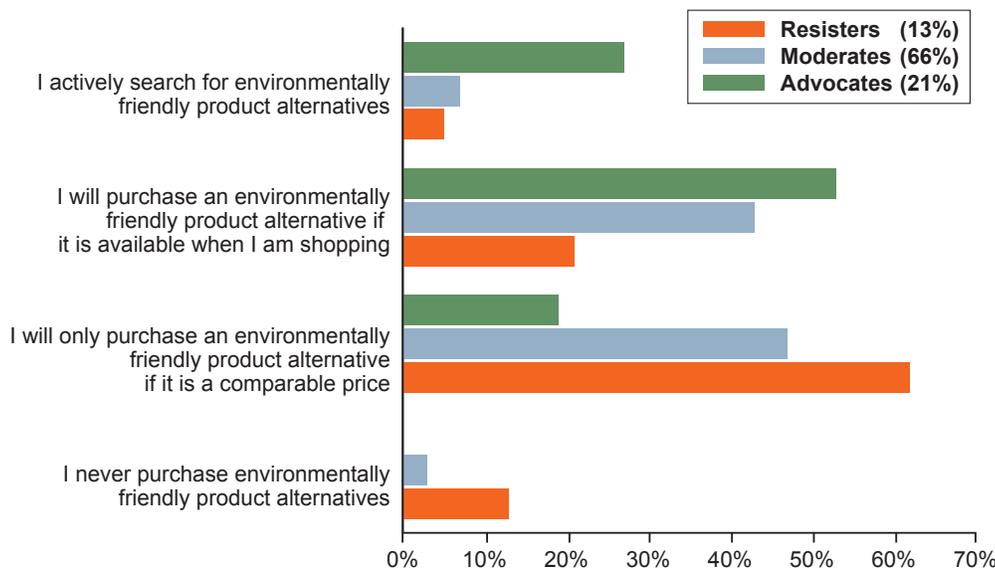
Conversely, Resisters are more than twice as likely as Advocates to view themselves as being sporty drivers. Certainly a more aggressive driving style does not align with embracing the ideas of going green, which Resisters clearly express little regard for.

Purchase Habits of Green Consumers

Another defining characteristic of Advocates is their shopping habits. They state an affinity toward manufacturers that have a green reputation or rating and are likely to seek environmentally friendly products in general. When and where these products are readily available, Advocates will more than likely make the decision to purchase the environmentally friendly products rather than those that are not.

Advocates are also attracted to and influenced by many of the benefits of “going green.”

Purchase Habits for Environmentally-Friendly Products by Group



Source: J.D. Power and Associates

However, this applies more often to Advocates’ small purchases rather than a new vehicle. Financial means will largely dictate a consumer’s decision on a large purchase such as a vehicle, but if the price between two choices is fairly comparable, the greener vehicle will sway their decision.

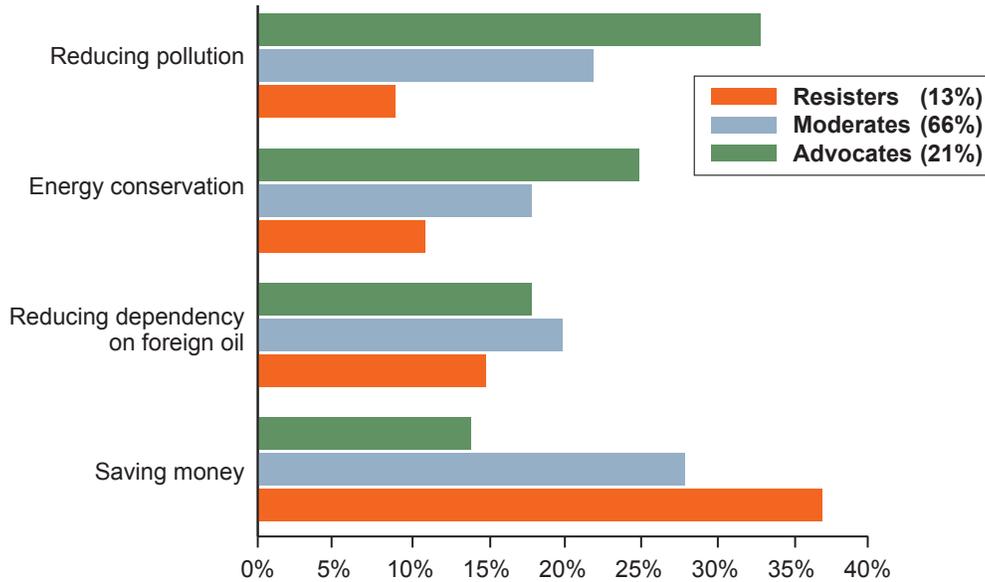
Benefits of Going Green

Advocates are also attracted to and influenced by many of the benefits of “going green.” In particular are the aspects of energy conservation and reducing pollution, which more Advocates indicate are the most important. These consumers also view reducing dependency on foreign oil as a strong positive.

With regard to these same benefits, Moderates align fairly well with Advocates. Where Moderates differ from Advocates is the benefit of saving money. While Advocates do acknowledge the savings advantage that going green can offer, this particular benefit resonates far more with Moderates and Resisters. Of note is that the second-most-common response by Resisters (following saving money) is that there are no benefits to going green.

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Most Important Benefit of "Going Green" by Group

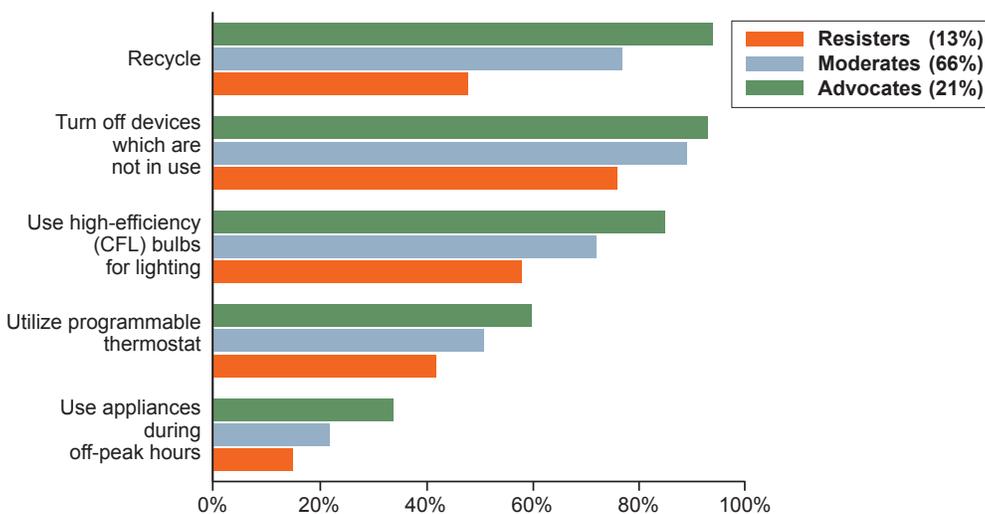


Source: J.D. Power and Associates

Living Green

Advocates are committed to many home-based green activities, with nearly all participating in recycling and turning off devices when they are not in use to help conserve energy. The utilization of high-efficiency bulbs and programmable thermostats are also very common practices among this consumer group.

Green Activities at Home (% actively doing) by Group



Source: J.D. Power and Associates

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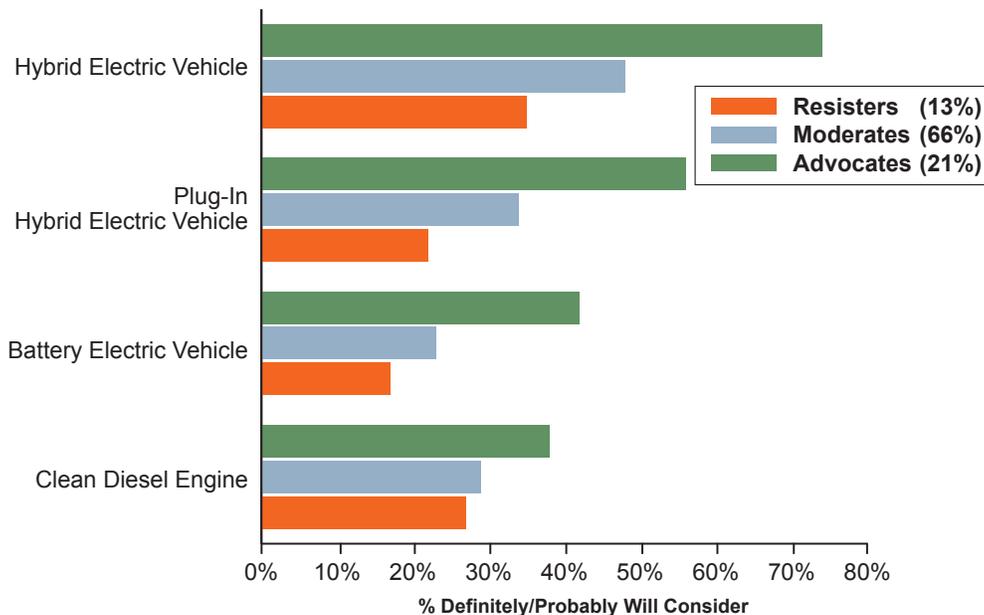
Moderates also do their part at home, and follow a similar pattern as Advocates but to a somewhat lesser degree.

Even Resisters make efforts to turn off devices as well as utilize high-efficiency bulbs and programmable thermostats. However, given their stated motivation to save money, these practices are likely more economically driven than environmentally driven.

Consideration of Alternative Powertrains

Considering Advocates' attitude toward green products, it is not unexpected that they express far greater interest in alternative powertrains.

Alternative Powertrain Consideration by Group



Source: J.D. Power and Associates Consumer Insights and Strategy (CIS) Group

However, it is worth noting that these self-identified Advocates represent a small proportion of the *Green Automotive Study* sample (about one in five respondents) and an even smaller proportion of auto sales. While the intentions and interests of this group are high, even these strong backers of going green admit to apprehensions based on limited resources and concerns about the supporting infrastructure to make the switch from conventional vehicles to an alternative variant.

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