

LOWCVP STAKEHOLDER SURVEY TOPLINE DATA - MAY 2009

This document presents the results of the LowCVP 2009 Stakeholder Survey.

- The results are based on 91 responses from LowCVP members.
- The survey was carried out from May 19-29 2009.
- Invitations and a web link were sent to 430 LowCVP members. A total of 99 members completed the survey, a response rate of 23%. 91 of these responses were eligible for analysis (the remaining 8 were received after the deadline and could not be incorporated).
- The questionnaire was designed and administered by LowCVP, and analyzed by Icaro Consulting Ltd.
- Results below are presented as percentages, but the reader should be aware that the sample ("N") is less than 100 cases. Where percentages do not add to 100% this is due to computer rounding of the raw data, or multiple responses.
- Comparisons with the 2007 survey are given wherever applicable.

1. The Big Picture

1. Which LowCVP stakeholder group are you a member of?

| | 2009 % (Base: 91) | 2007 % (Base: 78) |
|--------------------------|-------------------|-------------------|
| Automotive Industry | 37 | 35 |
| Fuel/Energy industry | 22 | 22 |
| Government/public sector | 7 | 4 |
| Academia/research | 13 | 10 |
| NGO/campaign group | 5 | 9 |
| Other | 15 | 21 |

2. As part of the implementation of the Climate Change Act should there be specific sectoral targets for carbon emissions from UK road transport.

| | 2009 % (Base: 91) | 2007 % (Base: 78) |
|-------------------|-------------------|-------------------|
| Strongly agree | 53 | 59 |
| Agree | 37 | 33 |
| Disagree | 3 | 3 |
| Strongly Disagree | 3 | 4 |
| Don't know | 3 | 1 |

3. Motorists consider that the environment is an important issue.

| | % (Base: 91) |
|-------------------|--------------|
| Strongly agree | 8 |
| Agree | 49 |
| Disagree | 29 |
| Strongly Disagree | 3 |
| Don't know | 11 |

4. In terms of the 130g/km EU regulated tail-pipe CO2 target for 2015, I expect the motor industry will:

| | % (Base: 91) |
|-------------------------|--------------|
| Significantly exceed it | 7 |
| Slightly exceed it | 9 |
| Meet it | 52 |
| Slightly miss it | 27 |
| Significantly miss it | 5 |

5. Rate the following potential policies (1 to 10) in terms of your view of their importance (1 is most important) to reducing transport emissions.

| | % ranking in top 3 (Base: 91) |
|--|----------------------------------|
| Measures to reduce new vehicle CO2 emissions (e.g. tax incentives, consumer information, regulation) | 80 |
| Support introduction of specific technology (e.g. electric/plug-in hybrids & fuel cell vehicles) | 57 |
| Measures to reduce the carbon intensity of fuels, including the introduction of biofuels (via Renewable Energy Directive and Fuel Quality Directive) | 50 |
| Measures to reduce the demand for travel | 46 |
| Encouraging walking, cycling, public transport modal shift | 43 |
| Eco-driving initiatives (including dashboard indicators) | 38 |
| Road pricing | 33 |
| Improved freight distribution | 33 |
| Enhanced use of information technology (e.g. satnavs, home working) | 32 |
| Encouraging shared car ownership and lift sharing | 22 |

6. In a global context, how is the UK doing in terms of its initiatives to cut carbon from road transport?

| | 2009 % (Base:91) | 2007 % (Base: 78) |
|-------------------|------------------|-------------------|
| Global leader | 4 | 3 |
| European leader | 15 | 22 |
| Average performer | 49 | 41 |
| Laggard | 31 | 35 |
| Don't know | 0 | 0 |

7. Rate the following stakeholder groups in terms of the contribution they have made to reducing road transport emissions in the UK. (Rank 1 to 10; 1 is most contribution)

| | % ranking in top 3 (Base: 91) |
|----------------------|-------------------------------|
| European Government | 67 |
| UK Government | 57 |
| Motor industry | 49 |
| Environmental groups | 38 |
| Local Government | 33 |
| Fuels industry | 30 |
| Drivers | 23 |

8. The UK Government currently gives sufficient priority to environmental and, specifically, low carbon transport issues

| | 2009 % (Base:91) | 2007 % (Base: 78) |
|-------------------|------------------|-------------------|
| Strongly agree | 1 | 5 |
| Agree | 15 | 21 |
| Disagree | 57 | 49 |
| Strongly Disagree | 15 | 19 |
| Don't know | 11 | 6 |

9. Which of the following statements most closely aligns with your views?

| | % (Base: 91) |
|--|--------------|
| Government should not 'pick winners' but should provide support to technologies according to their benefits | 20 |
| Government should identify a portfolio of promising solutions and provide sufficient support until they can compete with conventional vehicles | 25 |
| Government should give all realistic alternative technologies equal support to assist in their development | 12 |
| Government policy should set the aims (providing incentives, where suitable) but not prescribe the means (ie the technologies to be used) | 41 |
| Government should leave the market to decide which technologies to adopt | 2 |
| None of the above | 0 |

2. Issue Specific

10. Biofuels make a net positive contribution to tackling climate change when all direct and indirect environmental impacts are taken into account

| | 2009 % (Base:91) | 2007 % (Base: 78) |
|-------------------|------------------|-------------------|
| Strongly agree | 19 | 15 |
| Agree | 31 | 40 |
| Disagree | 23 | 19 |
| Strongly Disagree | 5 | 12 |
| Don't know | 22 | 14 |

11. Was the Government right to slow down the introduction of biofuels following the Gallagher Review?

| | % (Base:91) |
|------------------|-------------|
| Absolutely right | 32 |
| Probably right | 33 |
| Probably wrong | 13 |
| Definitely wrong | 12 |
| Not sure | 10 |

12. The current focus on support for electric and plug-in hybrid vehicles is:

| | % (Base:91) |
|------------------------|-------------|
| Fully justified | 23 |
| Probably justified | 34 |
| Probably unjustified | 25 |
| Definitely unjustified | 12 |
| Don't know | 5 |

13. The European Union has proposed an indicative target for 2020 of 95g/km. What do you consider to be an appropriate 2020 target for new car CO2 emissions?

| | % (Base:91) |
|-------------------|-------------|
| less than 90g/km | 37 |
| 90g/km | 15 |
| 95g/km | 32 |
| 100g/km | 10 |
| 110g/km | 2 |
| more than 110g/km | 3 |

14. The content of car advertising should be more strictly regulated to more actively inform and encourage the purchase of low carbon vehicles

| | 2009 % (Base:91) | 2007 % (Base: 78) |
|-------------------|------------------|-------------------|
| Strongly agree | 37 | 29 |
| Agree | 37 | 49 |
| Disagree | 15 | 13 |
| Strongly Disagree | 2 | 1 |
| Don't know | 8 | 8 |

15. The Government should actively encourage a shift from private car ownership to a shared model of ownership?

| | % (Base:91) |
|-------------------|-------------|
| Strongly agree | 10 |
| Agree | 18 |
| Disagree | 47 |
| Strongly Disagree | 10 |
| Don't know | 15 |

16. There should be an environmental fuel label scheme for used cars, similar to the new car label.

| | % (Base:91) |
|-------------------|-------------|
| Strongly agree | 37 |
| Agree | 46 |
| Disagree | 3 |
| Strongly Disagree | 2 |
| Don't know | 11 |

3. LowCVP Specific

17. Which of the following are the most important areas of activity for the LowCVP? Rate 1 to 10 (1 is most important)

| | % ranking in top 3 (Base: 91) |
|---|----------------------------------|
| Brokering industry agreements/initiatives to encourage the market for low carbon vehicles and fuels | 56 |
| Research to increase understanding of the low carbon vehicle market and technology | 47 |
| Provide input to UK Government policy-making | 77 |
| Provide input to European Government policy-making | 56 |
| Promoting low carbon vehicles and fuels to fleets and/or the public | 50 |
| Providing timely and accurate information via website, newsletters and event activities | 48 |
| Supporting UK business benefit from the shift to low carbon transport | 41 |

18. The LowCVP should seek to influence the international policy environment (particularly in the EU) and accept members from other countries.

| | % (Base: 91) |
|-------------------|--------------|
| Strongly agree | 16 |
| Agree | 43 |
| Disagree | 21 |
| Strongly Disagree | 4 |
| Don't know | 15 |

19. With more resources, which of the following should the LowCVP consider extending its activities to cover?

| | % (BASE: 91) |
|--|--------------|
| Reducing emissions from vehicles in use (e.g. eco-driving) | 43 |
| Encouraging the development of a 'green' economy | 35 |
| Encouraging early adopter markets | 48 |
| Promoting green travel plans and better fleet management | 30 |
| Electric and plug-in hybrid vehicles | 43 |
| Heavy commercial vehicles | 53 |

20. Considering the available resources, is the Secretariat of the LowCVP

| | 2009 % (Base:91) | 2007 % (Base: 78) |
|----------------------|------------------|-------------------|
| Very effective | 35 | 32 |
| Somewhat effective | 54 | 53 |
| Neither | 5 | 8 |
| Somewhat ineffective | 2 | 6 |
| Very ineffective | 3 | 1 |