

**To:** National Highway Traffic Safety Administration (NHTSA)  
**From:** Team Stratacomm  
**Date:** May 5, 2020  
**Subject:** Summary of NCAP 5-Star Safety Ratings Quantitative Research

## BACKGROUND

The purpose of the NCAP 5-Star Safety Ratings Quantitative Research was to:

- Validate and prioritize factors/considerations that influence the purchase decision.
- Measure likelihood of seeking out safety information to better understand consumer interest in communications about safety ratings.
- Evaluate how clear and easy to understand the window sticker is to consumers and prioritize the importance of specific types of information displayed on the sticker.
- Gauge familiarity and interest of driver assistance technologies.

This research consisted of a series of nine (9) in-person cognitive tests of the online survey instrument held at a focus group facility in Richmond, VA from October 22 – October 23, 2019. These tests were followed by a national online survey of 1,517 respondents, conducted from October 30 – November 11, 2019. The survey audience included:

- U.S. adults age 18+ with valid driver's licenses.
- Consumers in a purchase mindset (plan to purchase/lease new vehicle in next 12 months OR purchased/leased new vehicle in past 6 months).
- Primary/shared decision-maker for purchasing/leasing new vehicles in their household.

The findings from this research will be used in future projects/initiatives to better improve consumer comprehension of safety ratings information, enhance the usefulness of safety information found on the Monroney label ("window sticker") and the NHTSA.gov website, and guide the development of communications related to safety ratings and vehicle safety technologies.

## SUMMARY OF COGNITIVE TESTS

Overall, the survey instrument performed well, and participants did not have any major difficulties in understanding the questions or responses; consequently, there were no major issues or challenges with the instrument design. There were, however, a few opportunities for improvement, including minor wording edits and formatting changes based on participant feedback. These changes helped facilitate

the completion process by making the online survey instrument easier to complete.

## SUMMARY OF QUANTITATIVE SURVEY

**The quantitative research helped to validate and prioritize qualitative findings of how safety ratings play an important role in the purchase decision, especially when thought of in the context of the window sticker.**

- *Price, fuel economy, performance and safety* are among the top considerations when purchasing or leasing a new vehicle. However, when focusing specifically on the window sticker, *Price* is the most important information followed by *Safety ratings* and *advanced technology features*.
- It is important and valuable for consumers to have access to safety information, such as the 5-star Safety Rating, as it helps them feel like they are making a more informed decision. Nearly all those who have been to the dealership recently have at least skimmed the window sticker (83%) and many reviewed it thoroughly (29%). Most of those who have not been to a dealership expect they will review the window sticker thoroughly (66%).

**There is a high level of interest in learning about safety information and advanced safety technologies available on specific vehicles.**

**Consumers see a difference in crash avoidance and crash worthiness and want them assessed separately.**

- There is a high level of interest in learning about safety information and advanced safety technologies available on specific vehicles, with 61% of respondents saying they were extremely/very interested in learning about recommended safety technologies. Seventy-five percent of those who said they were unaware of the NHTSA website indicated they were extremely/very interested, so continued promotion of the NHTSA website and building awareness of it as a learning resource is recommended.
- Crashworthiness and crash avoidance are thought of as two separate things (82% prefer separate ratings) and information related to both can help the purchase decision (95%/88% extremely/very helpful, respectively). Do not combine crashworthiness ratings with crash avoidance. Evaluate and rate those separately and look for ways to provide government ratings and recommendations for both.

**Consumers show preferences for how safety information is displayed and how it impacts their purchase decision by narrowing their choices and giving them more confidence.**

- The 5-Star Safety Rating is not only important to include (82% say extremely/very important), but it must stand out on the window sticker as well (78%). Many also feel that advanced safety technologies must also be included (72%) and stand out (71%). To make the safety information better stand out, NHTSA should make the 5-star safety information larger/easier to read (69% say this would be extremely/very effective), display in a different color (67%), and add government seals/logos for credibility (61%).
- A 5-star rating system is preferred over an award for promoting safety ratings (47% selected a 5-star rating system vs 32% for

award). However, using a 5-star rating and an award for advanced safety technologies (54% selected award) in conjunction would be useful to consumers and would help inform their purchase decision.

- A large majority of consumers would find a government designation for safe cars helpful when making a purchase decision (92%), particularly in helping them narrow their choices (44%) and giving them confidence in their selection (50%). Because of these findings, consider creating an award program dedicated to recognizing specific makes/models that offer the recommended safety technology features.

### **Key Take-aways**

- Continue to promote the NHTSA website and build awareness as a learning resource.
- If/when the Monroney label gets redesigned, make sure to continue to include a dedicated section of the NCAP 5-Star Safety Ratings and make sure this section of the window sticker stands out with larger font, colors, and the NHTSA logo.
- Look to augment crash test rating information with a separate award that recognizes vehicles that stand out based on having recommended advanced safety technology features.
- Consider creating an award program dedicated to recognizing specific makes/models that offer the recommended advanced safety technology features.

# NCAP 5-Star Safety Ratings Communications Quantitative Research

January 16, 2020



**Team**  
**Stratacomm**

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# Background

The findings from this research will be used to **improve consumer comprehension** of safety rating information, **enhance the usefulness of safety rating information** found on the Monroney label (“window sticker”) & the NHTSA.gov website, and **guide the development of communications** related to safety ratings & vehicle safety technologies.

## Research Objectives

1. **Validate and prioritize** factors/considerations that influence the purchase decision.
2. **Measure** likelihood to seek out safety information to better understand consumer interest in communications around safety ratings.
3. **Evaluate** the window sticker in terms of how clear and easy to understand it is overall and prioritize the importance of specific types of information displayed on the sticker.
4. **Gauge** familiarity and interest with driver assistance technologies.



## Qualification Criteria

- U.S. ages 18+
- Possess a valid driver's license
- In a *vehicle-purchase* mindset
  - Plan to purchase/lease new vehicle in next 12 months OR
  - Purchased/leased new vehicle in past 6 months
- Primary/Shared decision-maker for purchasing/leasing new vehicle

## Participants

In-person Cognitive Tests (n=9)

Online survey (n=1,517)



## MODE

### In-person Cognitive Tests

- Online survey taken at focus group facility

### Online survey

- Online on any device



## LENGTH

In-person Cognitive Tests:  
55 min

Online survey:  
20 min



## DATES

### In-person Cognitive Tests:

October 22-23, 2019

### Online survey:

October 30 - November 11, 2019



## GEOGRAPHY

### In-person Cognitive Tests:

Richmond, VA metro area

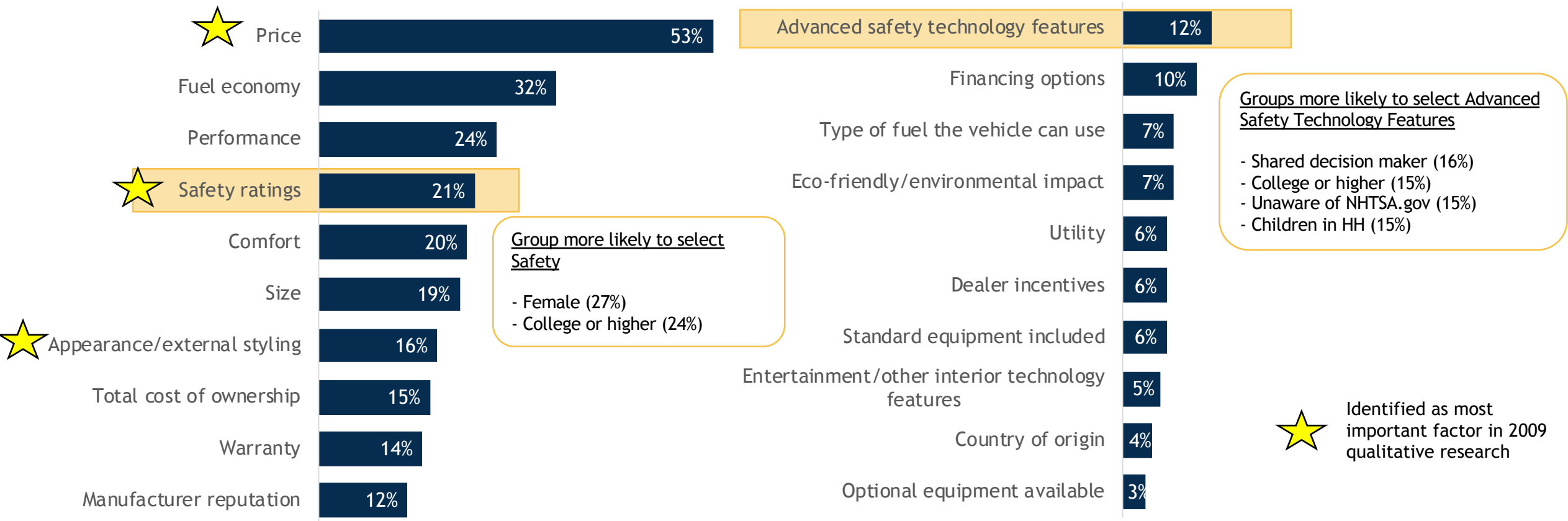
### Online survey:

National



# Detailed Findings Section 1: What considerations are most influential?

# Outside of *Price*, which is a dominant consideration when purchasing a new vehicle, *Fuel economy*, *Performance* and *Safety ratings* are the most important factors.



Base: All respondents (n=1517)  
 Q10. When purchasing a new vehicle, meaning a new model year vehicle, what are the **three** most important factors that you consider?

# What information on the window sticker is most important?

Max-Diff is an analytical tool to obtain preference scores for longer lists of items when rank ordering exercises are not feasible.

The approach is based on a series of 4 items, in this case factors that affect consumers' decision-making when purchasing a vehicle. Participants select one that is the most important and the least important.

This exercise includes 7 iterations of the task, each with a different combination of items. The data are then combined on the back-end and analyzed to compute a utility score which indicates what factors are most important.

## Sample Iterations

Of the factors displayed here, which is the **MOST** important and which is the **LEAST** important to your decision?

*Iteration 1*

	MOST IMPORTANT	LEAST IMPORTANT
Where the vehicle was assembled	<input type="radio"/>	<input type="radio"/>
Optional equipment	<input type="radio"/>	<input type="radio"/>
Warranty information	<input type="radio"/>	<input type="radio"/>
Advanced safety technology features	<input type="radio"/>	<input type="radio"/>

Previous

Next

Of the factors displayed here, which is the **MOST** important and which is the **LEAST** important to your decision?

*Iteration 2*

	MOST IMPORTANT	LEAST IMPORTANT
Warranty information	<input type="radio"/>	<input type="radio"/>
Standard equipment	<input type="radio"/>	<input type="radio"/>
Optional equipment	<input type="radio"/>	<input type="radio"/>
Vehicle model information (e.g., engine, trim)	<input type="radio"/>	<input type="radio"/>

Previous

Next

# While *Price* remains the top factor when buying a vehicle, *Safety ratings* and *Advanced safety tech* are of high importance to include on the window sticker.

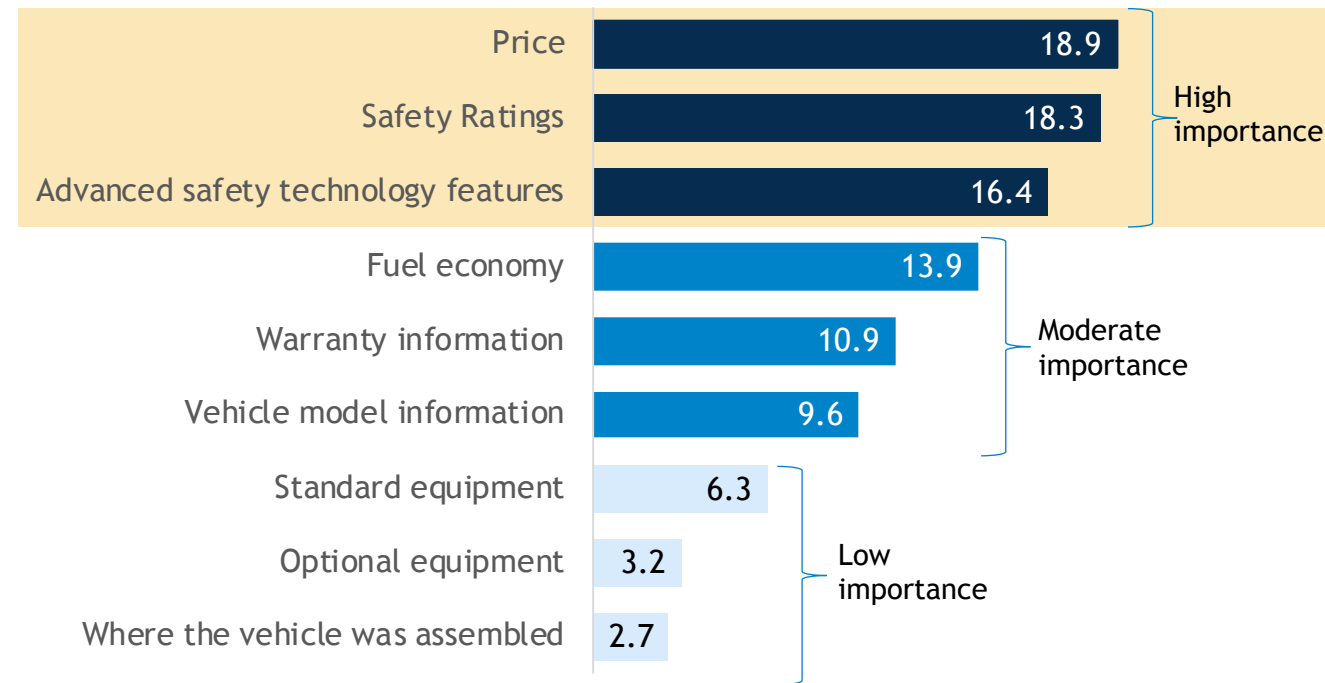
*Imagine you are making a decision on whether or not to purchase a vehicle. There would certainly be a number of factors that affect your decision, many of which are included on the window sticker.*

*We want to gain some insight into how you make this decision based on the information provided on the window sticker by asking a series of tradeoff scenarios. In each scenario, we'll show you four possible factors affecting your decision. Please select which factor (among the set of four) is most important to your decision, and which is least important.*

*We need to ask you repeated tradeoff scenarios (involving different factors each time) so that we can learn what is truly important to you when making your new vehicle purchase decision.*

*Of the factors displayed here, which is the MOST important and which is the LEAST important to your decision?*

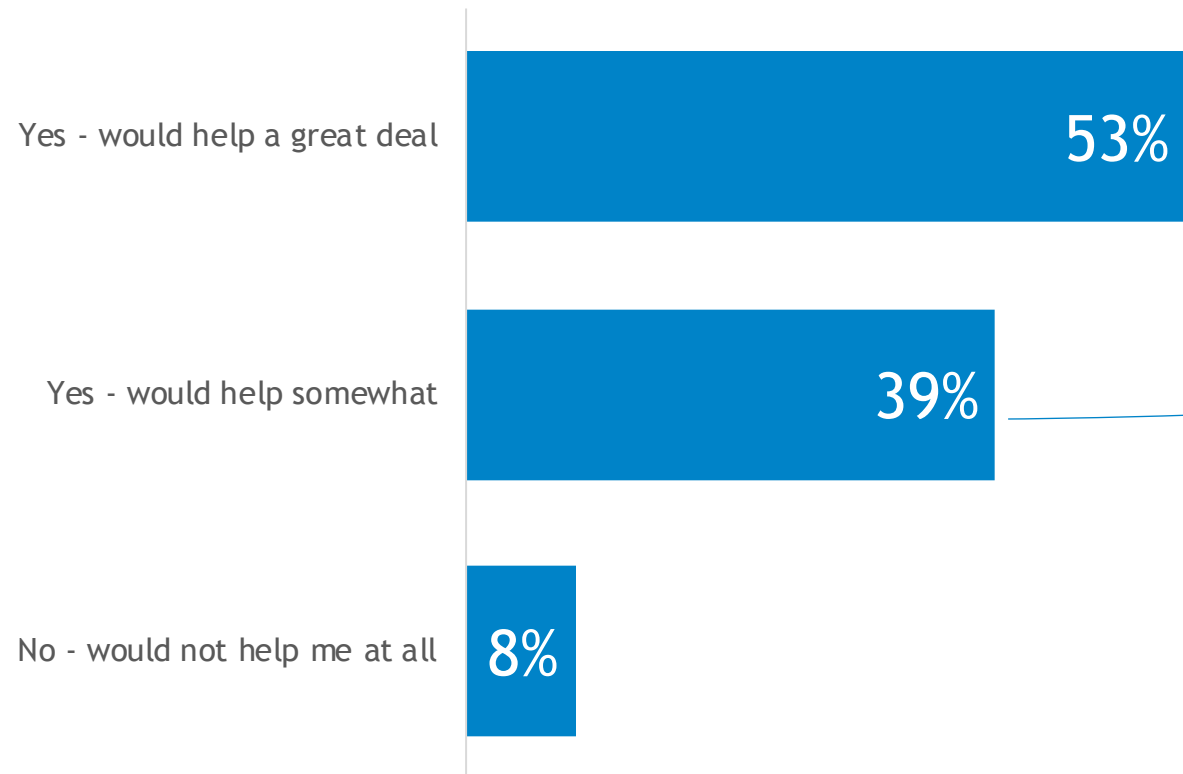
Most important information on the window sticker when buying a vehicle



THE CHART ABOVE SHOWS THE UTILITY SCORES FOR EACH FACTOR. THE SCORES ADD TO 100 AND EACH INDIVIDUAL SCORE REPRESENTS THE RELATIVE IMPORTANCE OF EACH ITEM. THE HIGHER THE SCORE, THE GREATER THE IMPORTANCE.

# A large majority of consumers would find a government designation for safe cars helpful - specifically in narrowing their choices and giving them confidence in their selection.

## Helpfulness of government designation for safe cars



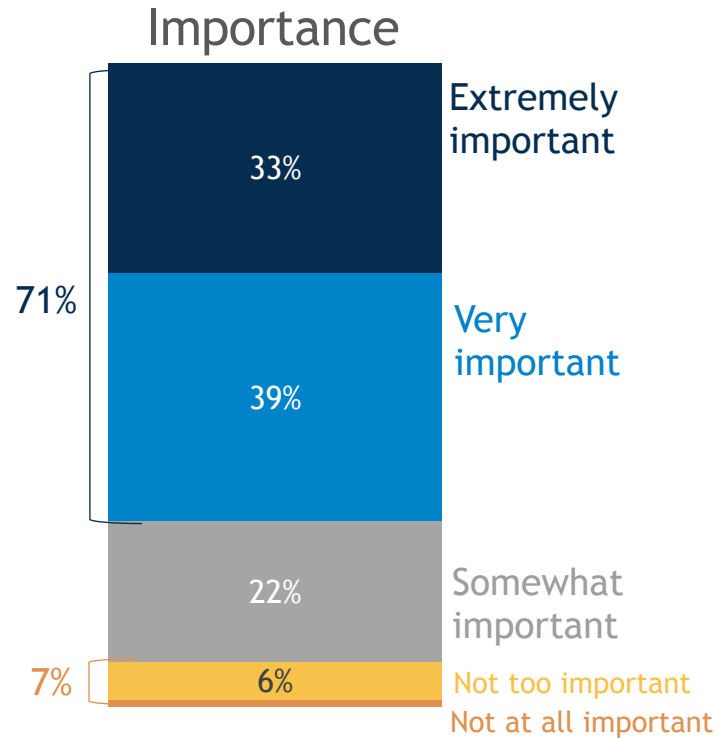
Ways a government designation/recognition would help decision-making	% selected
Ensures I can pick a car with a safety rating I am comfortable with	50%
Gives me confidence in the vehicle I purchase	50%
Ensures I can pick the safest vehicle possible	48%
Helps me narrow down possible makes/models	44%
Gives me confidence in a specific make/model that I want to purchase	44%
Gives me confidence in my purchase decision process	42%
Helps me pick a car that will be easier to insure for cost purposes	32%
Makes me feel more comfortable with the MSRP/sales price	26%
Helps me pick a car that will have a higher resale value	25%

Base: All respondents (n=1517)

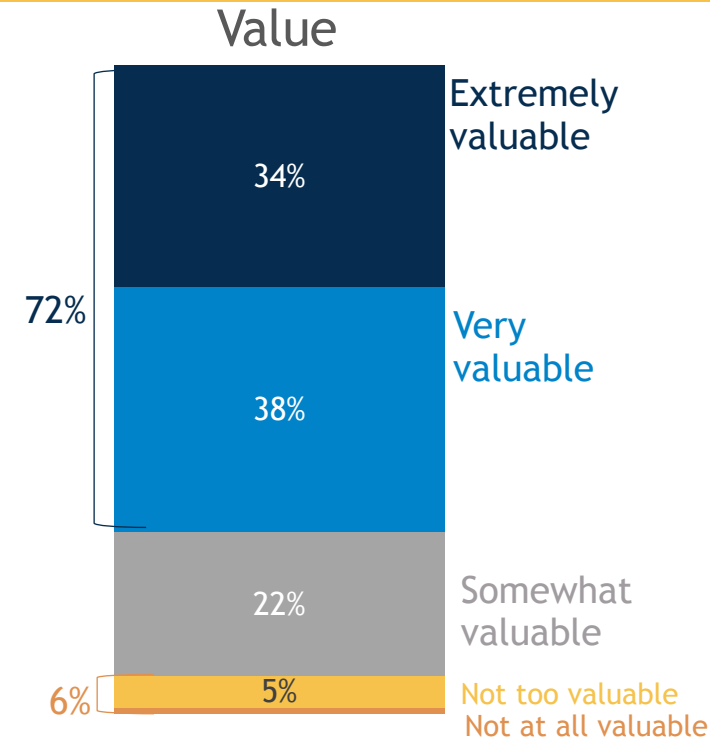
Q14. Now imagine if the government organization that is responsible for providing safety ratings also gave special recognition and designation to the top performing vehicles in the areas of crashworthiness and crash avoidance. Would having that additional information help you when making a decision to purchase or lease a new vehicle?

Q15. How would having that additional information help you when making a decision to purchase or lease a new vehicle? Please select all that apply?

# Access to and value of safety information is important to consumers when they're in the purchasing mindset.



How important is it to you personally to have access to safety information such as the 5-star Safety Ratings when purchasing a new vehicle?



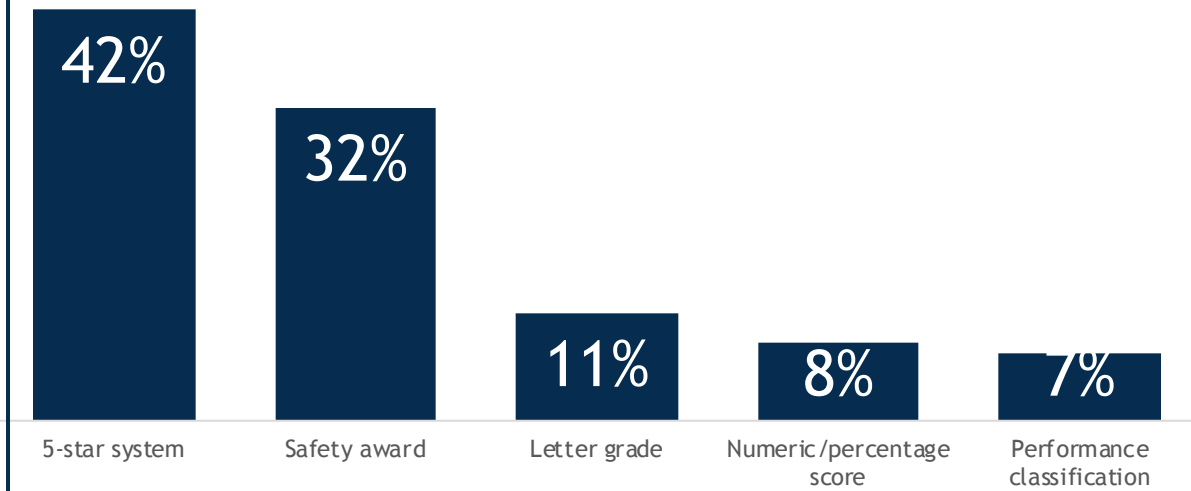
How valuable to you personally is the 5-star Safety Rating in helping you to feel like you are making an informed decision when purchasing a new vehicle?

# Those concerned with safety are favorable to the 5-star system, but awards for both safety and advanced safety tech promotion rate highly.

Selected *Safety Ratings* as one of their top three most important factors

21%

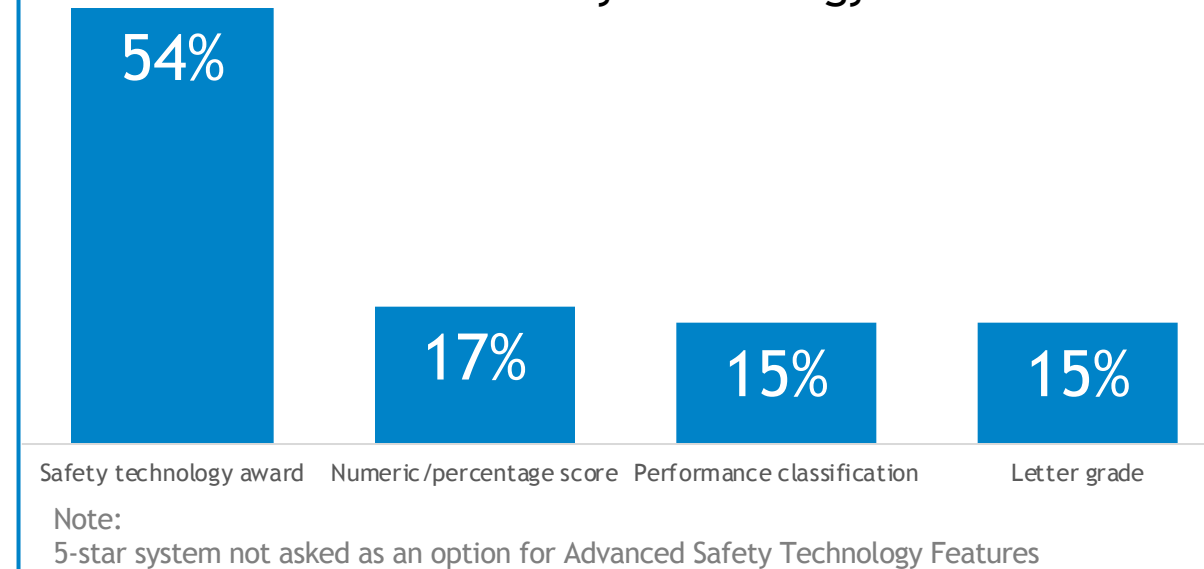
Best way to promote Safety Ratings



Selected *Advanced Safety Technology Features* as one of their top three most important factors

12%

Best way to promote Advanced Safety Technology Features



Base: Selected Safety (n=326)

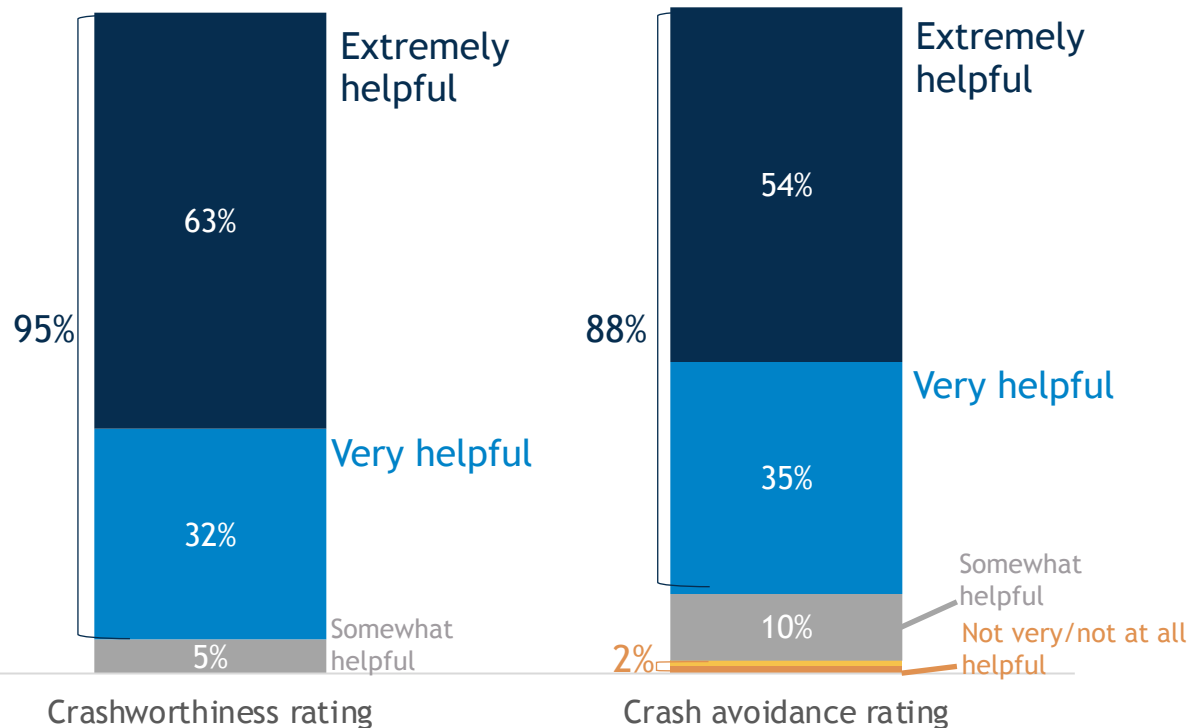
Q11a. You selected **Safety** as one of your top three most important factors. There are different ways to promote safety information. Which ONE of the following do you most prefer?

Base: Selected Advanced safety technology features (n=183)

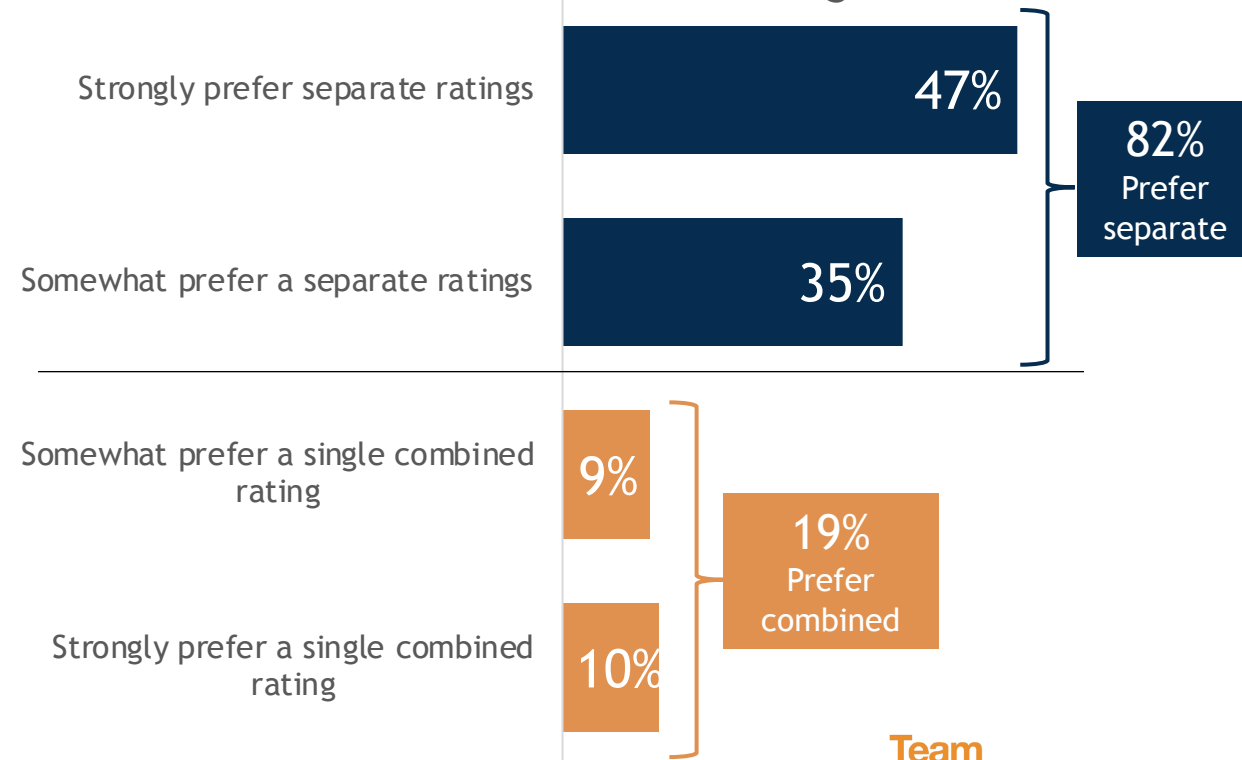
Q11b. You selected **Advanced safety technology features** as one of your top three most important factors. There are different ways to promote information related to Advanced safety technology features. Which ONE of the following do you most prefer?

# Ratings for crashworthiness and crash avoidance are helpful and separate ratings for each are preferred.

## Helpfulness of rating



## Separate or combined ratings for crashworthiness and crash avoidance ratings



Base: Selected Safety (n=326)

Q12. Now thinking of specific types of safety information, please rate how helpful the following would be when making a purchase decision.

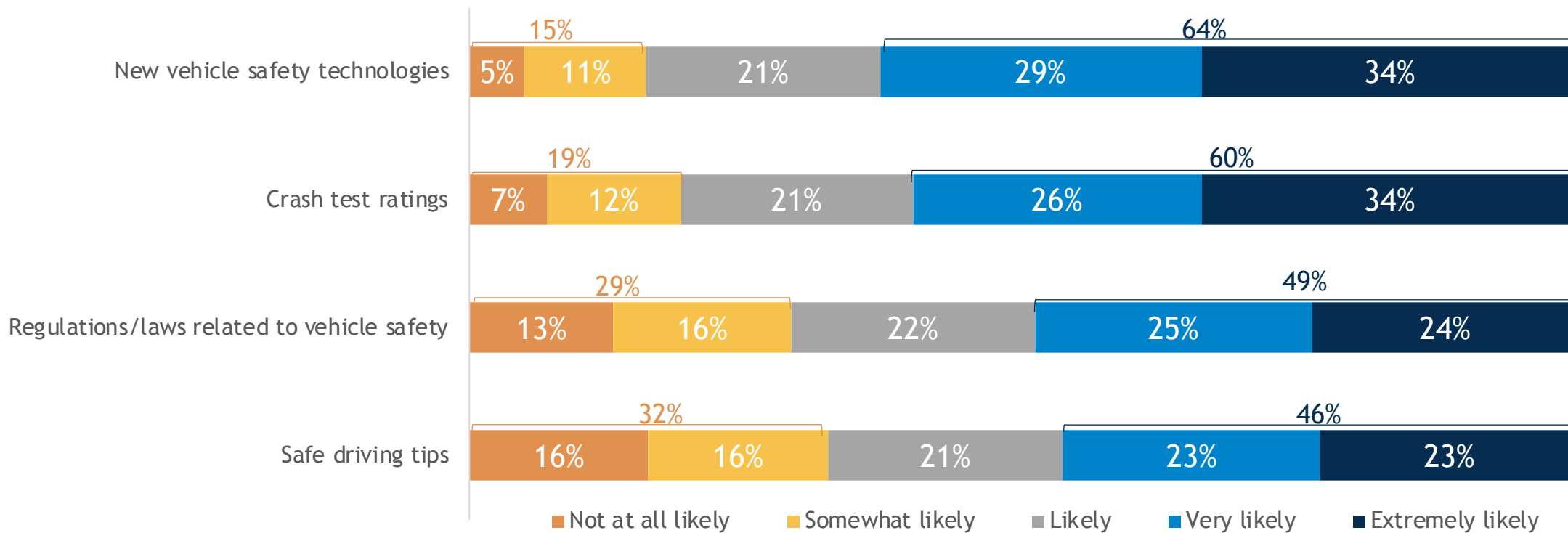
Q13. Would you prefer separate safety ratings for crashworthiness and crash avoidance or would you rather have a single rating that combined crashworthiness and crash avoidance?



# Detailed Findings Section 2: How interested are consumers in safety information?

# When researching safety, consumers are more likely to look up new vehicle safety technologies and crash test ratings. Regulations/laws and safe driving tips aren't as relevant.

Types of information that consumers are likely to seek out

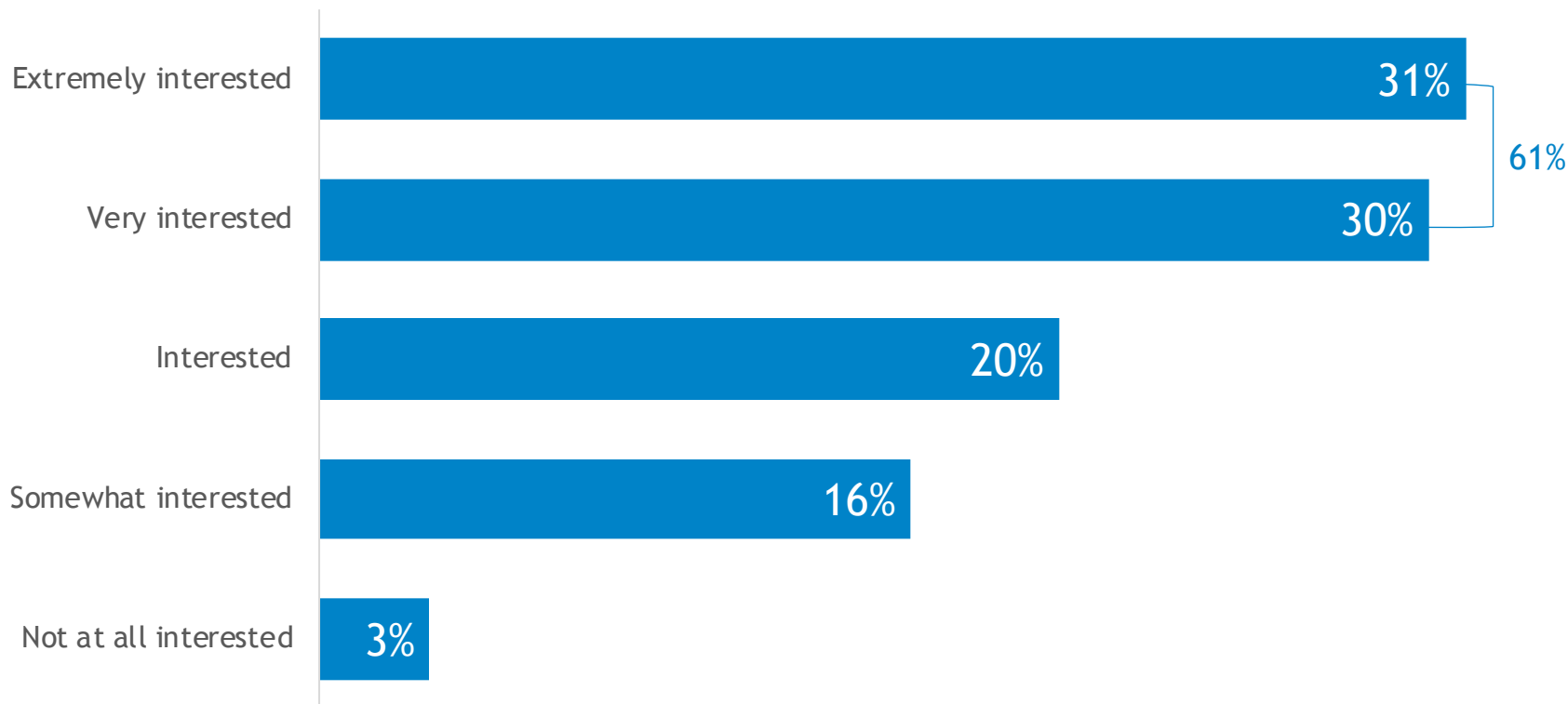


Base: All respondents (n=1517)

Q16. When looking for information about new vehicles you are considering, how likely are you to seek out the following types of information about the safety of the vehicle?

# There are high levels of interest in learning about recommended safety technology and opportunity to build awareness of NHTSA.gov among those Extremely/Very interested.

Interest in learning about recommended safety technologies



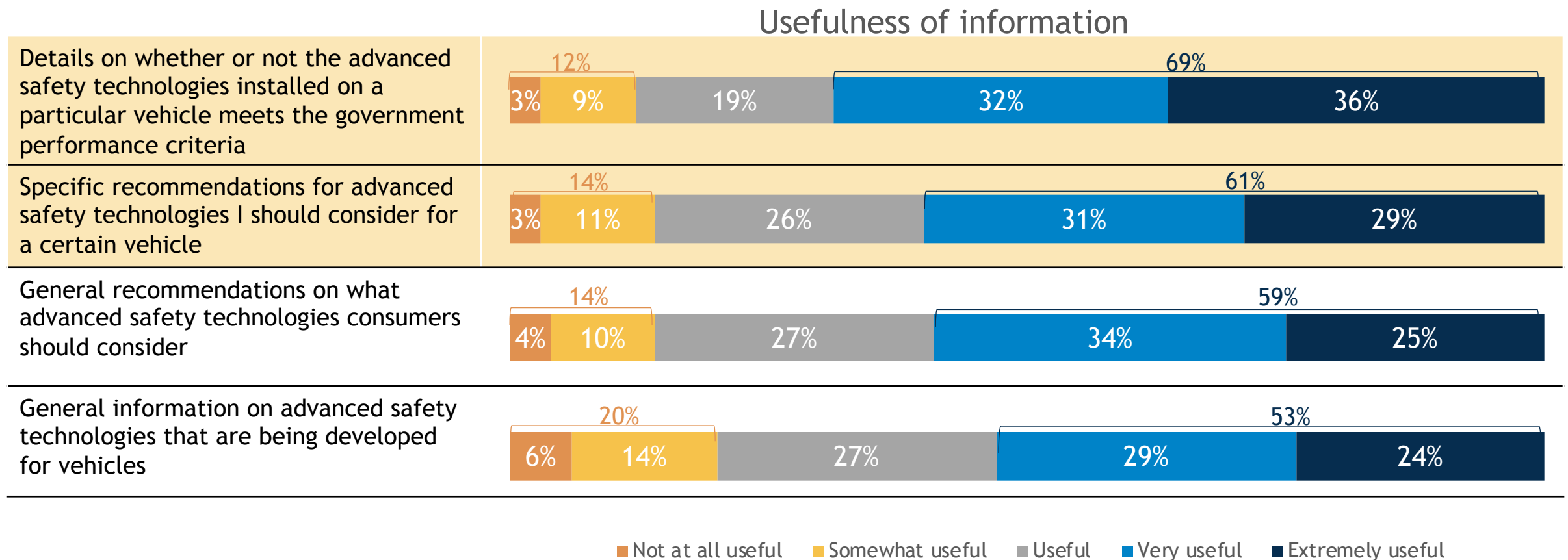
Groups more likely to be extremely/very interested in learning about recommended safety technologies

- Unaware of NHTSA.gov (75%)
- Hispanic (70%)
- College or higher (68%)
- Children in HH (67%)
- Seeking info (66%)
- North census region (66%)

Base: All respondents (n=1517)

Q33. How interested are you in learning about recommended safety technologies that may be available to you when you purchase or lease a new vehicle?

# Information related to specific vehicles is considered more useful than general recommendations and broader information.

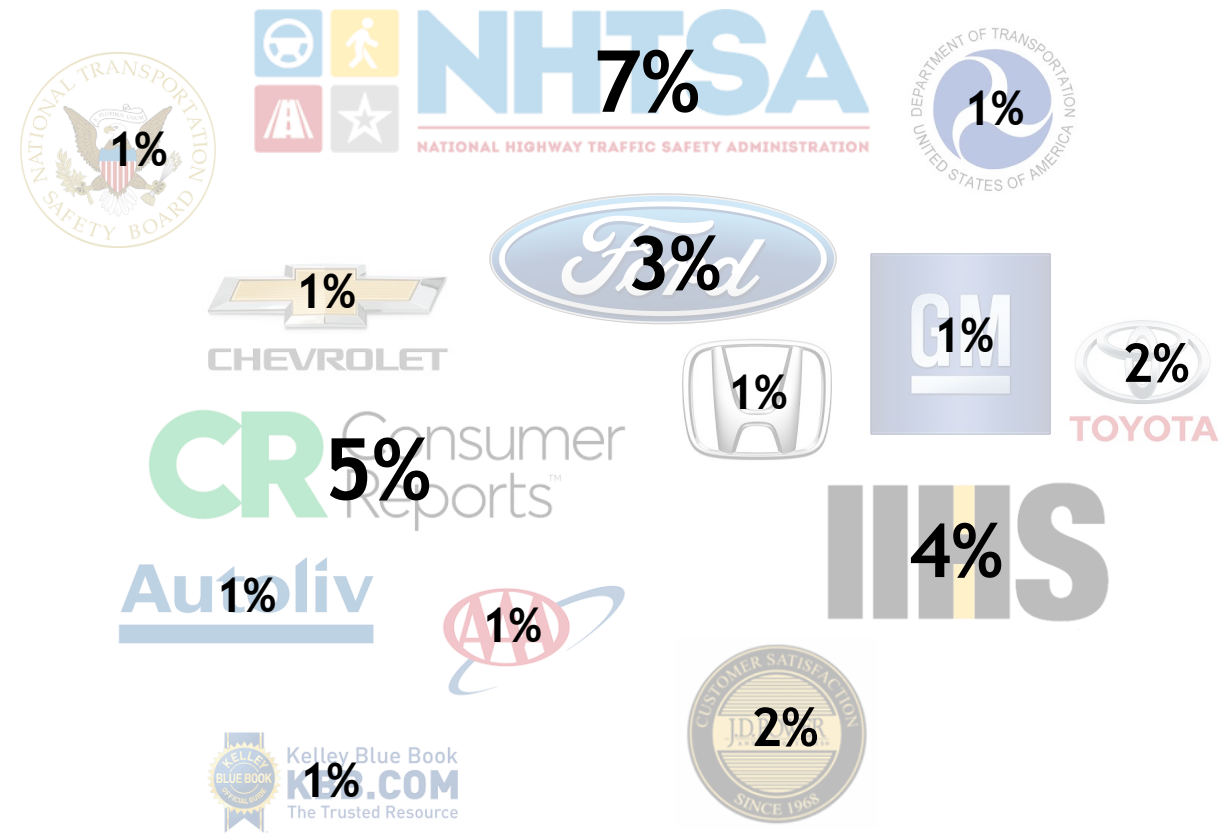


# Less than half of consumers have an idea of what specific organization(s) conduct crash tests on new vehicles.

Based on what you know, what organizations conduct crash tests on new vehicles?

## 56% Don't Know

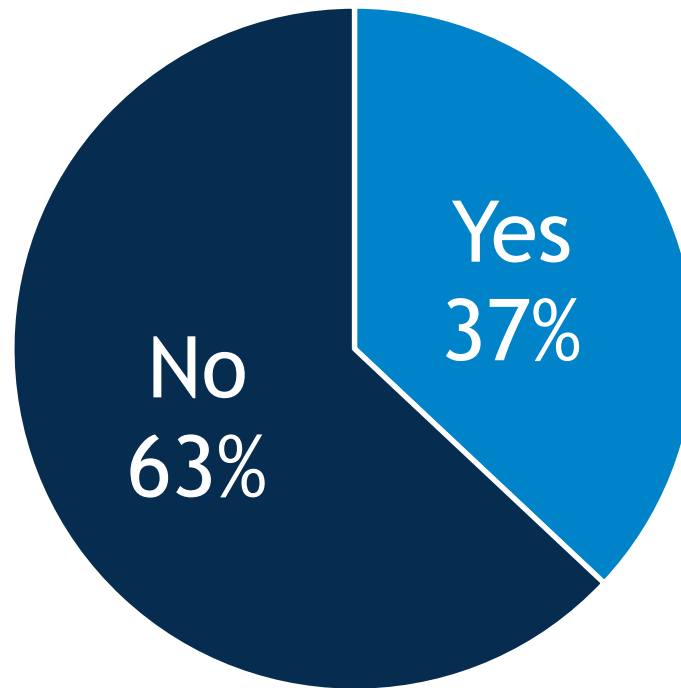
Organizations that conduct crash tests	% mentioned
U.S. Government (NHTSA 7%, NTSB, DOT)	13%
Specific OEMs (Ford, GM, Chevy, Toyota, Honda)	10%
Consumer Reports	5%
IIHS	4%
J.D. Power and Associates	2%
Other organizations (Autoliv, AAA, KBB)	12%



Base: All respondents (n=1517)  
 Q17. Based on what you know, what organizations conduct crash tests on new vehicles?

# Most consumers are unaware of the NHTSA website.

Awareness of NHTSA website



Groups more likely to be unaware of website

- Shared decision maker (75%)
- Not employed/student/homemaker (73%)
- Considering purchasing a vehicle (72%)
- Retired (72%)
- Age 55+ (72%)
- Some college/tech school (72%)
- Female (71%)
- HS or less (69%)
- Divorced/Separated/Widowed (69%)
- No children in HH (68%)

Groups more likely to be aware of website

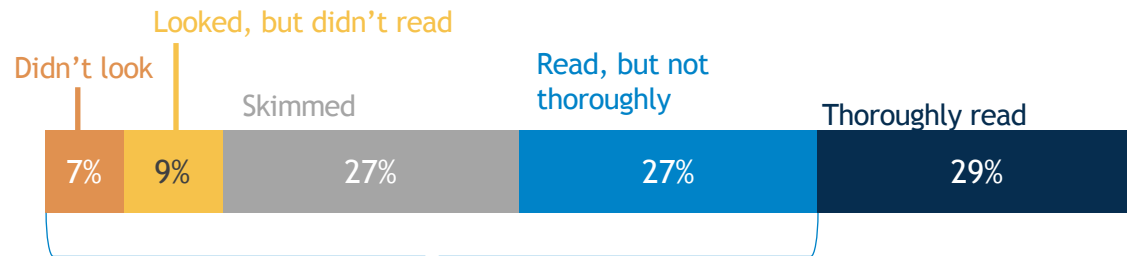
- Hispanic (47%)
- College or higher (46%)
- Male (46%)
- Children in HH (45%)
- Employed (44%)
- Age 18-34 (44%)
- Seeking info (43%)

# Detailed Findings Section 3: What are perceptions of the window sticker?

Nearly all those who have been to the dealership have at least skimmed the window sticker and many reviewed it thoroughly. Most of those who have not been to a dealership expect they will review the window sticker thoroughly.

Whatever the reason for not reading the sticker thoroughly, both audiences think that the window sticker can be informative.

### Recent purchaser/dealership visitor



Reasons for not reading sticker thoroughly	% selected
I was more interested in the features and getting a feel for the vehicle	42%
The salesperson informed me of the information before seeing the car	26%
I knew the information from my preliminary research before arriving at the dealership	19%
Window sticker information wouldn't have informed my decision	9%

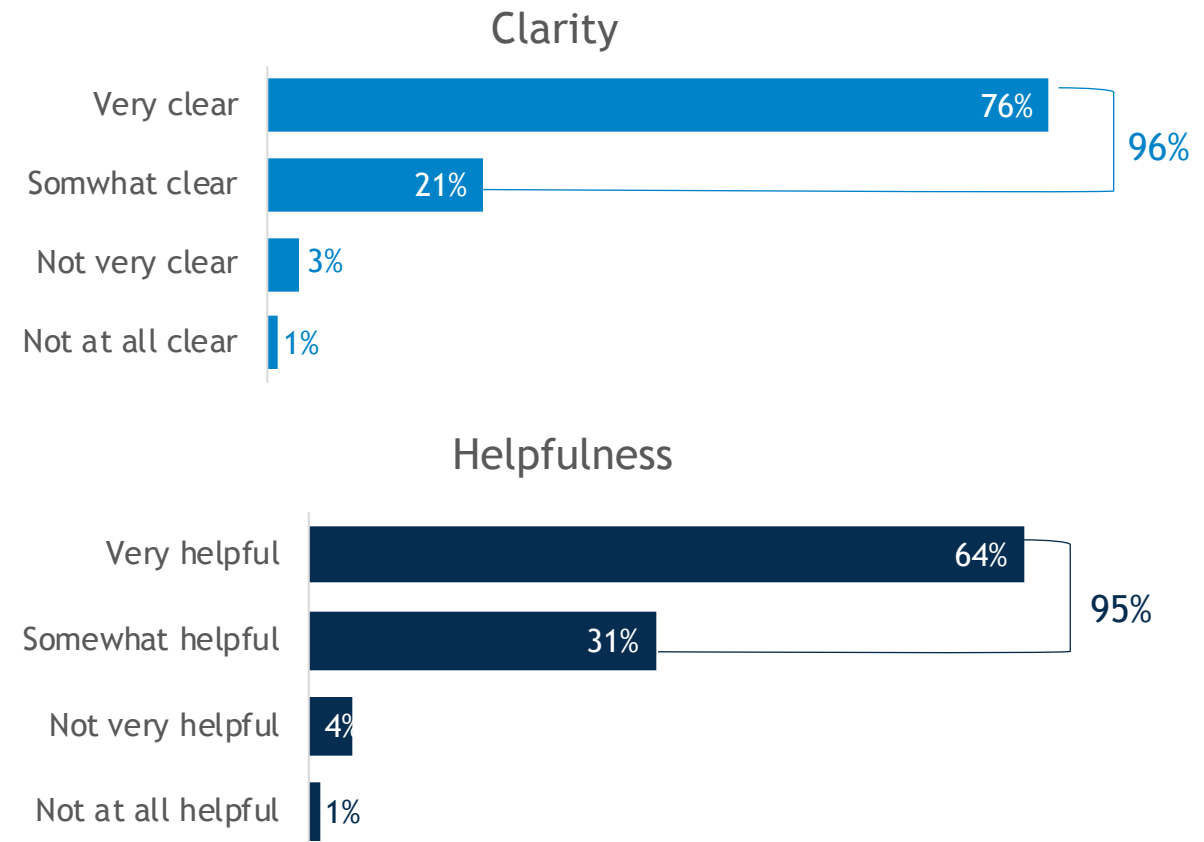
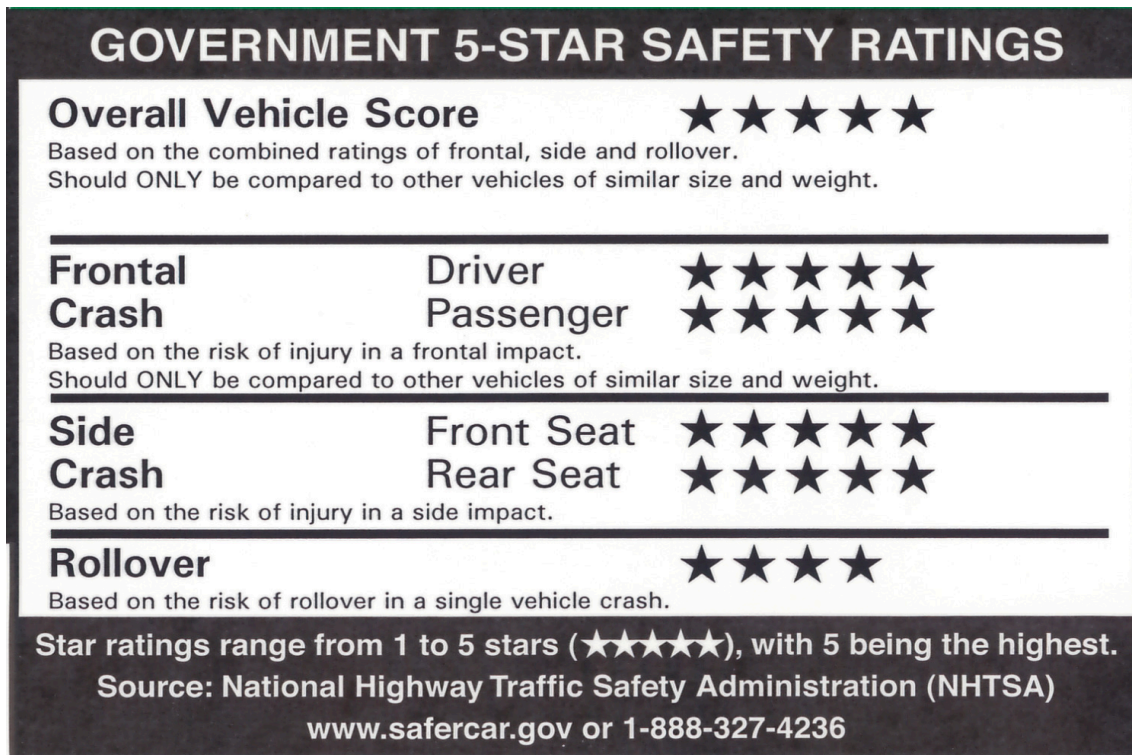
### Planned purchaser, haven't visited dealership



Reasons for not reading sticker thoroughly	% selected
I would research the information before arriving at the dealership	36%
I expect the salesman to inform me of the information	29%
I would be more interested in the features and getting a feel for the vehicle	27%
Window sticker information wouldn't have informed my decision	7%



# The safety ratings on the window sticker are both clearly presented and helpful in the vehicle purchasing process.

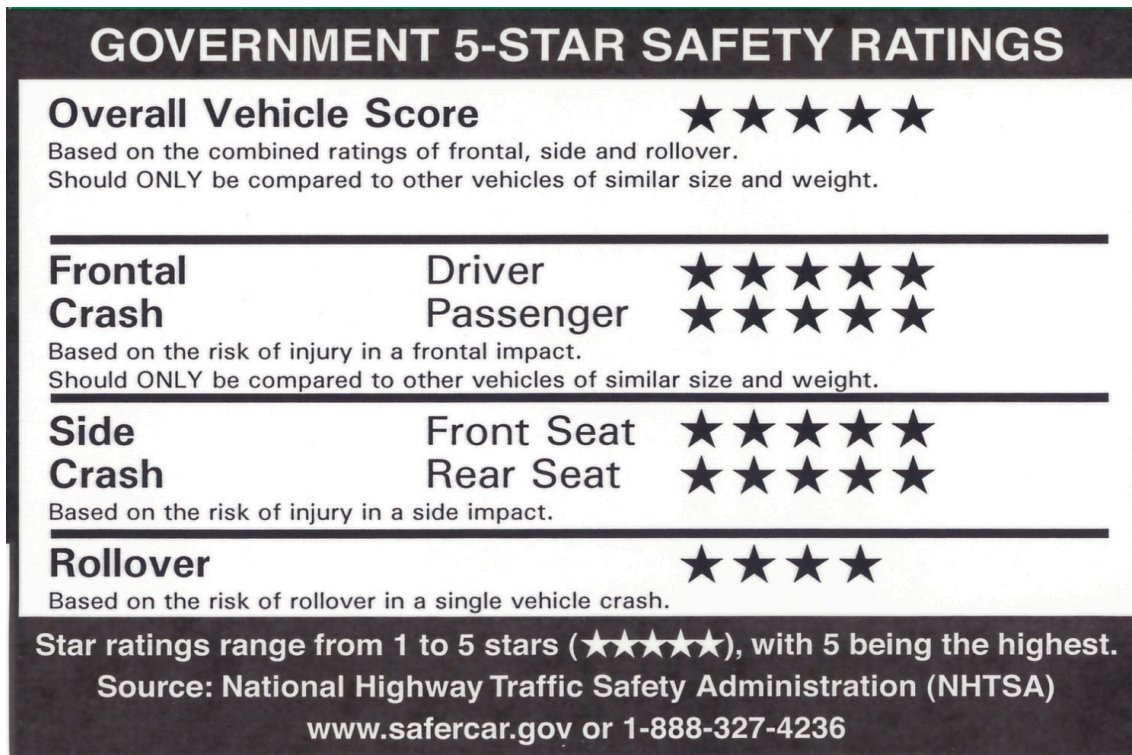


Base: All respondents (n=1517)

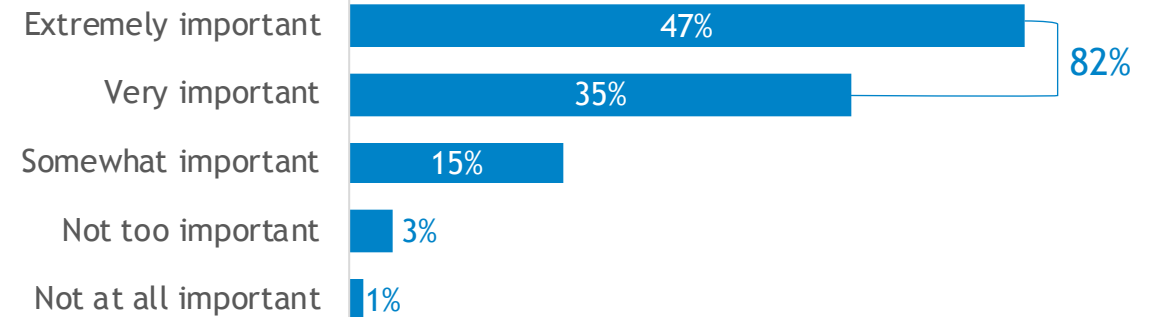
Q29a. How clear is the information presented in this section?

Q29b. How helpful is the information on the window sticker toward making an informed decision about vehicle safety when purchasing or leasing a new vehicle?

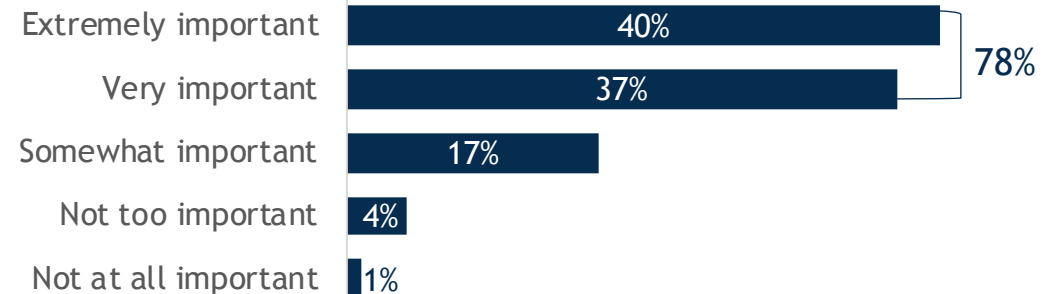
# The safety rating is not only important to include, but it must stand out on the window sticker as well.



## Importance of Including



## Importance of Standing Out



Base: All respondents (n=1517)

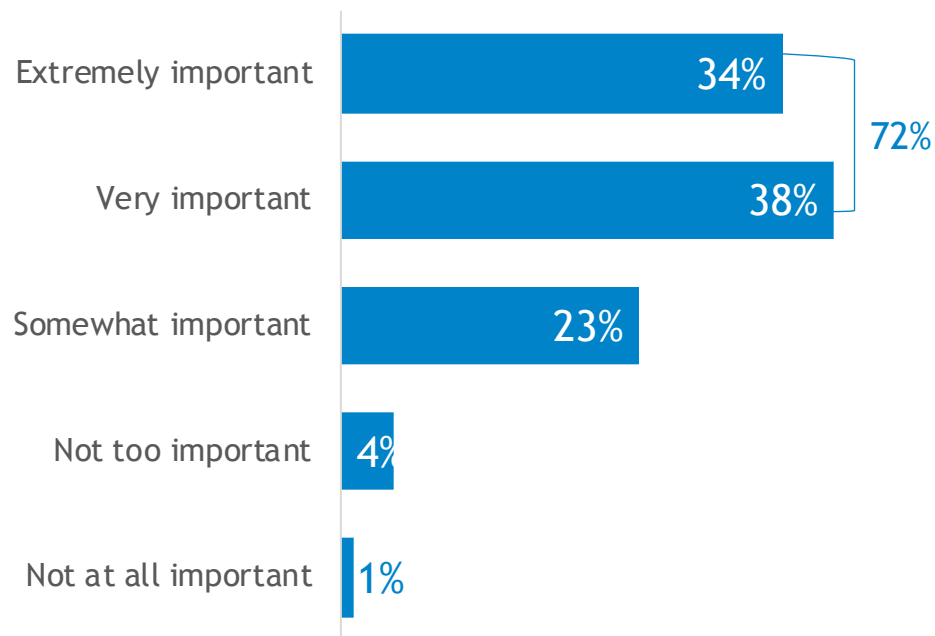
Q30a. How important is it to include the 5-star safety rating information on the window sticker?

Q30b. How important is it to make the government 5-star safety rating information stand out on the window sticker?

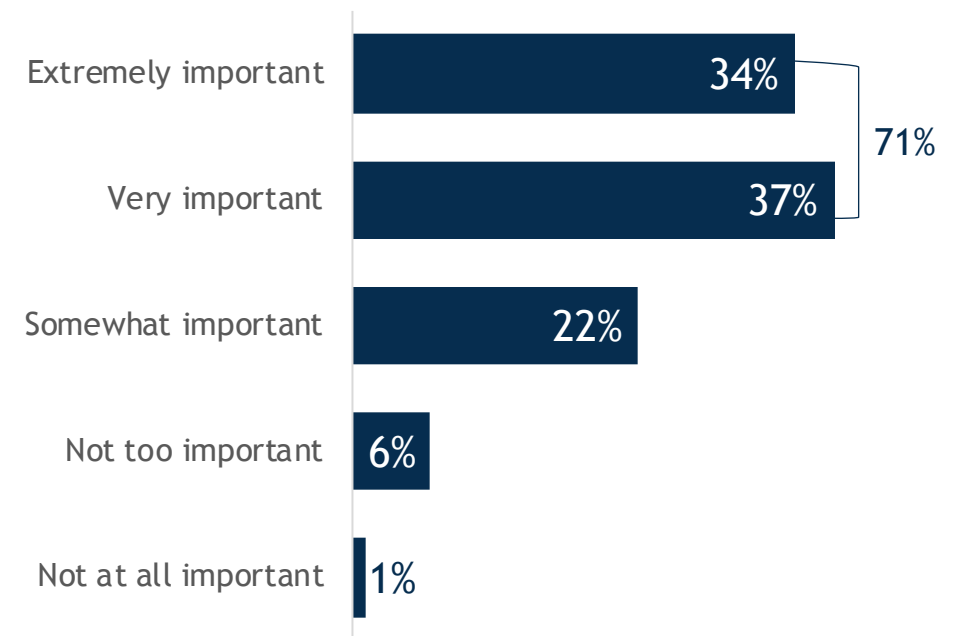
# Most believe it is important to include information about advanced safety technologies on the window sticker and to help make that information stand out.

## Information about advanced safety technology features on the window sticker

### Importance of Including



### Importance of Standing Out



Base: All respondents (n=1517)

Q33b. Now thinking back about the window sticker, how important is it to include information about advanced safety technology features on the window sticker?

Q33c. How important is it to make information about advanced safety technology features stand out on the window sticker?

# Consumers want to see information related to the advanced safety tech features on the window sticker, albeit not as much as the safety ratings.

**VEHICLE DESCRIPTION**  
**TAURUS** DG 101259  
 2013 SE FWD  
 4-CYLINDER  
 3.0L V6 FLEX FUEL ENGINE  
 6-SPEED AUTO TRANSMISSION  
 EXTERIOR: SILVER METALLIC  
 INTERIOR: DUNE

**Fuel Economy and Environment**  
 Fuel Economy: **23** MPG (combined city/hwy) | **19** MPG city | **29** MPG highway  
 You save **\$0** in fuel costs over 5 years compared to the average new vehicle.  
 Annual fuel cost: **\$2,300**  
 EPA DOT: Flexible-Fuel Vehicle Gasoline-Ethanol (E85)

**GOVERNMENT 5-STAR SAFETY RATINGS**  
 Overall Vehicle Score: **Not Rated**  
 Frontal Crash: **Not Rated**  
 Side Crash: **★★★★**  
 Rollover: **★★★**

**SALES INFORMATION**  
 MSRP: \$27,740.00  
 TOTAL MSRP: \$27,740.00

Evaluation of 5-Star Safety Ratings on window sticker  
 Evaluation of advanced safety technology features on window sticker  
 % Extremely/very important

Importance of Inclusion  
 Importance of Standing Out

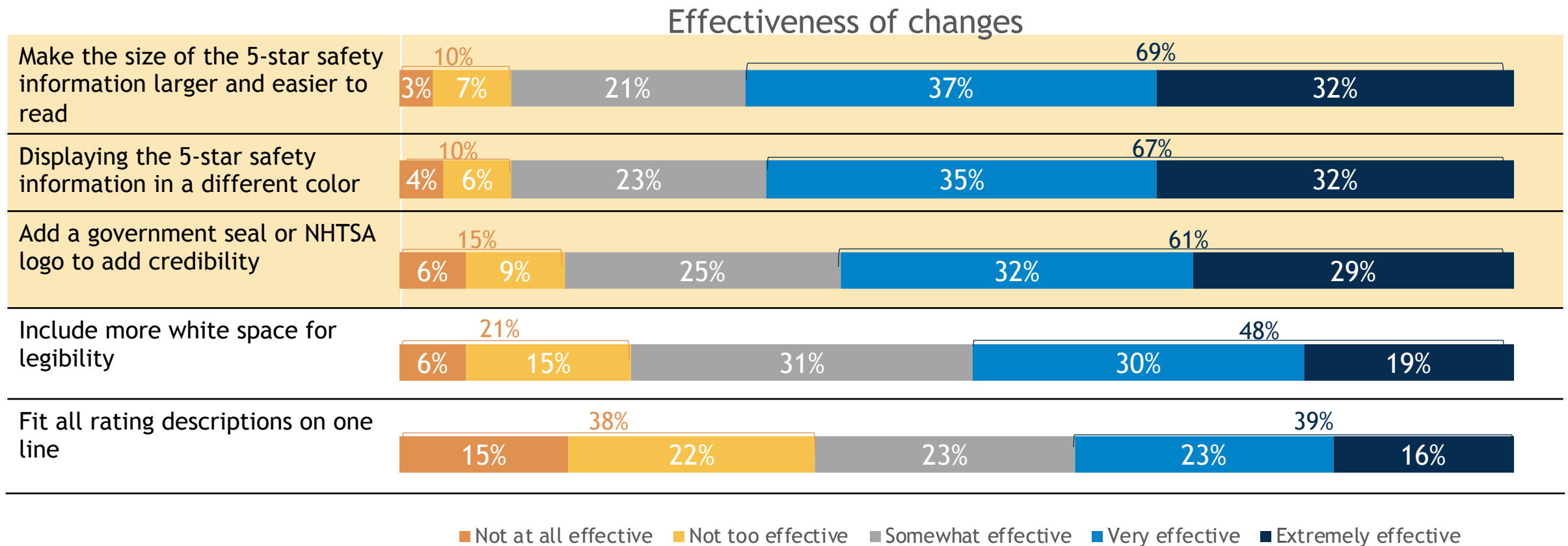
82%

72%

78%

71%

To make the safety information better stand out, NHTSA should make it larger/easier to read, display in a different color and add government seals or logos for credibility.



Base: All respondents (n=1517)

Q31. Please rate how effective the following changes would be in helping make the government 5-star safety rating information stand out on the window sticker?

# Detailed Findings Section 4: How familiar and interested are consumers with driver assistance technologies?



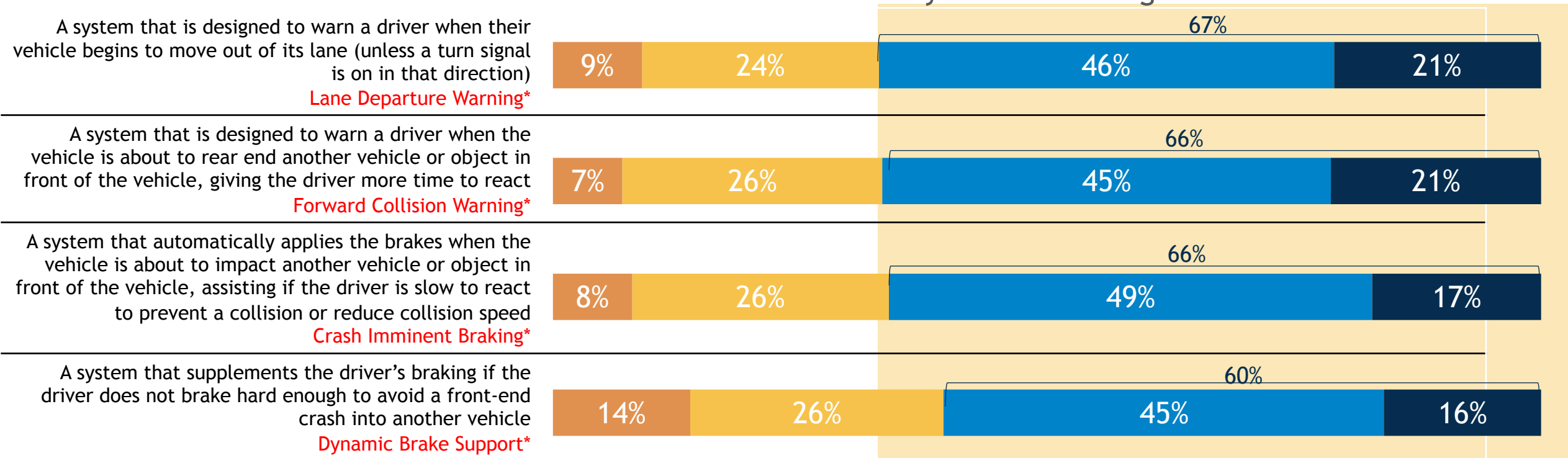
Recommended safety technologies can range from older, universal technology like air bags and seat belts to recent advanced tech features like cameras and sensors.

What comes to mind when you think of “recommended safety technologies”	% mentioned
Air bags	12%
Brakes/Braking features	11%
General technology mentions	10%
Vehicle mentions	9%
Camera	8%
Lane monitoring/assistance features	6%
Seat belts	5%
Test mentions	5%
Blind spot monitoring	4%
OEM/Organizations	3%
MISC Other mentions*	14%
Don't Know/None/Refused	13%

\* Other mentions include isolated responses that could not be assigned to an existing code and were not mentioned consistently enough to generate a new code. Examples include mentions such as unspecified “New technologies,” general mentions to safety, general positive mentions etc.

# When presented with descriptions of four specific safety technologies, most are familiar or have them installed on their vehicle.

## Familiarity with technologies



\* Name not shown to respondents

■ Never heard of ■ Heard of, but unfamiliar ■ Familiar, but not on my car ■ I have this on my car

Base: All respondents (n=1517)

Q35. How familiar are you with each of the following recommended safety technologies in vehicles?



# Features related to brake support and warnings are seen as more necessary, but many still view these technologies as sufficient but not necessary.

## Necessity of technologies

A system that automatically applies the brakes when the vehicle is about to impact another vehicle or object in front of the vehicle, assisting if the driver is slow to react to prevent a collision or reduce collision speed  
**Crash Imminent Braking\***



A system that is designed to warn a driver when the vehicle is about to rear end another vehicle or object in front of the vehicle, giving the driver more time to react  
**Forward Collision Warning\***



A system that supplements the driver's braking if the driver does not brake hard enough to avoid a front-end crash into another vehicle  
**Dynamic Brake Support\***



A system that is designed to warn a driver when their vehicle begins to move out of its lane (unless a turn signal is on in that direction)  
**Lane Departure Warning\***



\* Name not shown to respondents

■ Not necessary    ■ Nice to have    ■ Must have

Base: All respondents (n=1517)

Q36. Thinking about your vehicle purchase, would you say each of the following technologies is a must have, nice to have, or not necessary?

# When asked to name the technologies based on their descriptions, the majority of respondents didn't know. Notably, they couldn't discern a major difference between Crash Imminent Braking and Dynamic Brake Support.

A system that is designed to warn a driver when their vehicle begins to move out of its lane (unless a turn signal is on in that direction) "Lane Departure Warning" [name not shown to respondents]	% mentioned
Lane assist/lane assistance	5%
Lane departure warning/lane departure warning system	4%
Don't know	62%

A system that is designed to warn a driver when the vehicle is about to rear end another vehicle or object in front of the vehicle, giving the driver more time to react "Forward Collision Warning" [name not shown to respondents]	% mentioned
Collision warning/avoidance	5%
Don't know	67%

A system that supplements the driver's braking if the driver does not brake hard enough to avoid a front-end crash into another vehicle "Dynamic Brake Support" [name not shown to respondents]	% mentioned
Brake assist/assistance	4%
Automatic brake/braking	4%
Don't know	66%

A system that automatically applies the brakes when the vehicle is about to impact another vehicle or object in front of the vehicle, assisting if the driver is slow to react to prevent a collision or reduce collision speed "Crash Imminent Braking" [name not shown to respondents]	% mentioned
Automatic brake/braking	8%
Assistance brake/braking	3%
Don't know	64%

Most respondents can correctly identify standard vs. optional equipment based on how safety technologies are displayed on the safety ratings section of NHTSA's website.





As part of the safety ratings section of their website, the National Highway Traffic Safety Administration currently includes information about four technologies. The image below is from one particular vehicle and would appear on the National Highway Traffic Safety Administration website.

2019  
**HONDA ACCORD**  
4 DR FWD

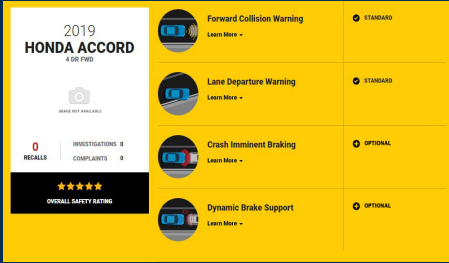
IMAGE NOT AVAILABLE

0 RECALLS | INVESTIGATIONS 0 | COMPLAINTS 0

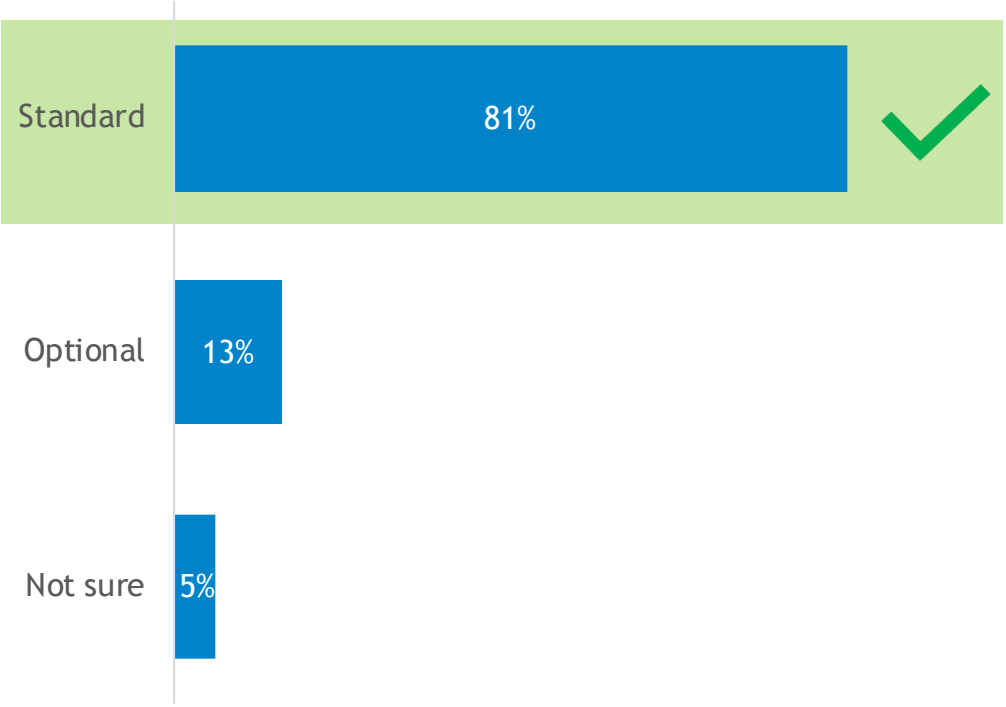
★★★★★  
OVERALL SAFETY RATING

	<b>Forward Collision Warning</b> <a href="#">Learn More</a> ▾	✓ STANDARD
	<b>Lane Departure Warning</b> <a href="#">Learn More</a> ▾	✓ STANDARD
	<b>Crash Imminent Braking</b> <a href="#">Learn More</a> ▾	+ OPTIONAL
	<b>Dynamic Brake Support</b> <a href="#">Learn More</a> ▾	+ OPTIONAL

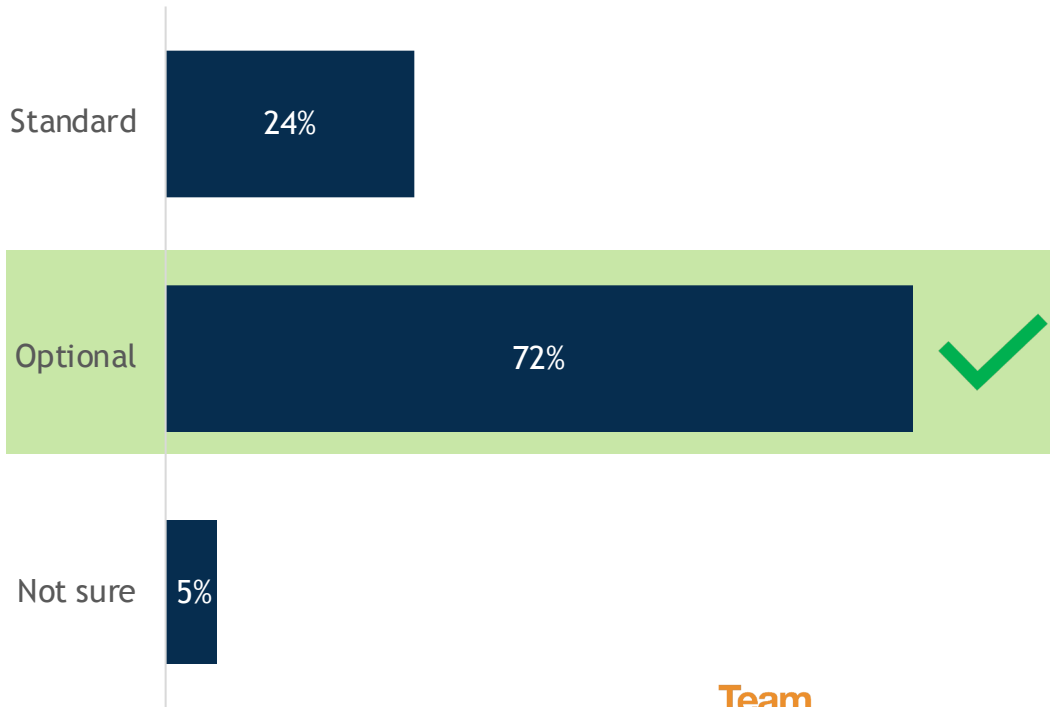
The website is clear for most on what technologies are standard and which ones are optional on vehicles. Incorrect answers and *Not sure* are higher among lower levels of education.



Forward collision warning and lane departure warning are...



Crash imminent braking and lane departure warning are...



Base: All respondents (n=1517)  
 Q39. For the 2019 Honda Accord, are forward collision warning and lane departure warning...  
 Q40. For the 2019 Honda Accord, are crash imminent braking and dynamic brake support...

# Conclusions + Strategic Imperatives

# Conclusions + Strategic Imperatives

- Safety ratings play an important role in the purchase decision, especially when thought of in the context of the window sticker.
  - If/when the Monroney label gets redesigned, make sure to continue to include a dedicated section for the NCAP 5-Star Safety Ratings and make that section of the window sticker stand out with larger font, colors and the NHTSA logo.
  - Crashworthiness and Crash Avoidance are thought of as two separate things and information related to both can help the purchase decision. Do not combine crashworthiness ratings with crash avoidance. Evaluate and rate those separately and look for ways to provide government ratings and recommendations for both.
  - Look to augment crash test rating information with a separate award that recognizes vehicles that stand out based on having recommended advanced safety technology features.

# Conclusions + Strategic Imperatives

- There is a high level of interest in learning about safety information and advanced safety technologies available on specific vehicles
  - Continue to promote the NHTSA website and build awareness of it as a learning resource. Those most interested in learning about recommended safety technologies are largely unaware of the NHTSA website.
  - Highlight specific webpages related to driver assistance technologies where consumers can learn about safety and research availability of recommended safety technologies on specific vehicles.

# Conclusions + Strategic Imperatives

- A 5-star rating system is preferred over an award for promoting safety ratings. However, a 5-star rating and an award for advanced safety technologies used in conjunction would be useful to consumers and would help inform their purchase decision.
- A large majority of consumers would find a government designation for safe cars helpful when making a purchase decision, particularly in helping them narrow their choices and giving them confidence in their selection.
  - Consider creating an award program dedicated to recognizing specific makes/models that offer the recommended advanced safety technology features.



# Appendix

# Executive Summary

# Executive Summary

*Validate qualitative findings and prioritize factors/considerations that influence the purchase decision.*

- *Price, Fuel economy, Performance and Safety* are among the top considerations when purchasing or leasing a new vehicle.
- When focusing specifically on the window sticker, *Price* is the most important information followed by *Safety ratings* and *Advanced technology features*.
- It is important and valuable for consumers to have access to safety information such as the 5-star Safety Rating as it helps them feel like they are making a more informed decision.
- A 5-star rating system is preferred over an award. However, a 5-star rating and an award for advanced safety technologies used in conjunction would be helpful.
- Need to keep ratings for crashworthiness and crash avoidance separate. While both ratings are important to informing the purchase decision, they are viewed as different.

# Executive Summary

*Measure likelihood to seek out safety information to better understand consumer interest in communications around safety ratings.*

- Most will seek information related to specific vehicles such as safety technologies and crash test ratings.
- There are high levels of interest in learning about recommended safety technologies including specific driver assistance technologies recommended by the government and that are available in specific vehicles.
- There is limited awareness of organizations that conduct crash tests on new vehicles and limited awareness of NHTSA.gov.

# Executive Summary

*Evaluate the window sticker in terms of how clear and easy to understand it is overall and prioritize the importance of specific types of information displayed on the sticker.*

- Nearly all those who have been to the dealership have at least skimmed the window sticker and many reviewed it thoroughly.
- Most of those who have not been to a dealership expect they will review the window sticker thoroughly.
- The Government 5-Star Safety Rating portion of the window sticker is clearly presented and helpful.
- The Government 5-Star Safety Rating is an important part of the window sticker and it is important to make that information stand out.
- Most believe it is important to include information about advanced safety technologies on the window sticker and to help make that information stand out.

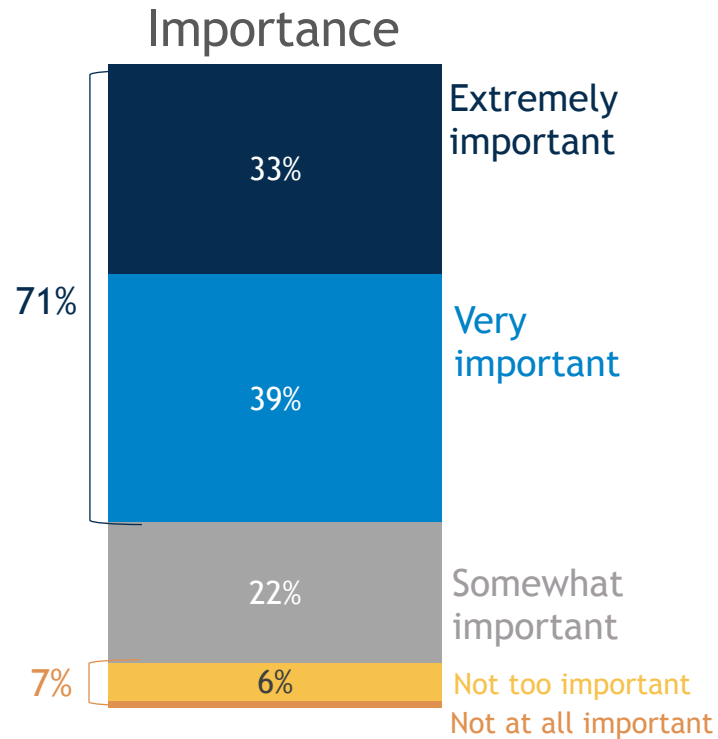
# Executive Summary

*Gauge familiarity and interest with driver assistance technologies.*

- When respondents were asked what was top-of-mind when they heard the general term “recommended safety technologies,” there is **limited awareness of what is recommended** and **examples provided by respondents varied greatly** between older and newer safety technologies.
  - The limited awareness is **partially a function of not knowing what the technologies are called**. However, when presented with detailed descriptions of how four specific safety technologies function, **most respondents indicate that they are familiar or have them installed** on their vehicle.
- Technologies tend to be **more *Nice to haves* than *Must haves***.
- Most respondents can **correctly identify standard vs. optional equipment** based on how safety technologies are displayed on the safety ratings section of NHTSA’s website.

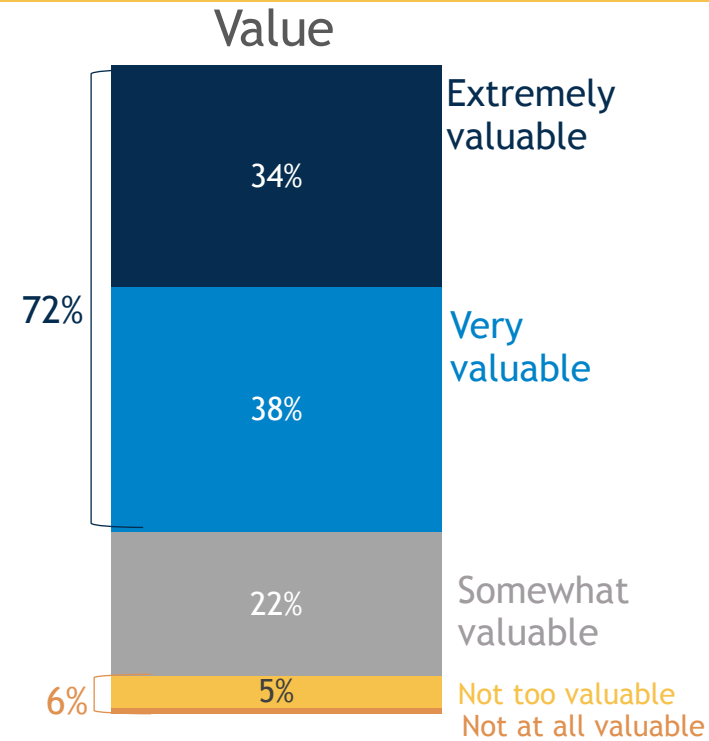
# Additional Detailed Slides

# Access to and value of safety information is important to consumers when they're in the purchasing mindset.



**Access to safety information is extremely/very important**

- Unaware of NHTSA.gov (81%)
- Hispanic (80%)
- African-American (78%)
- Children in HH (78%)
- College or higher (76%)

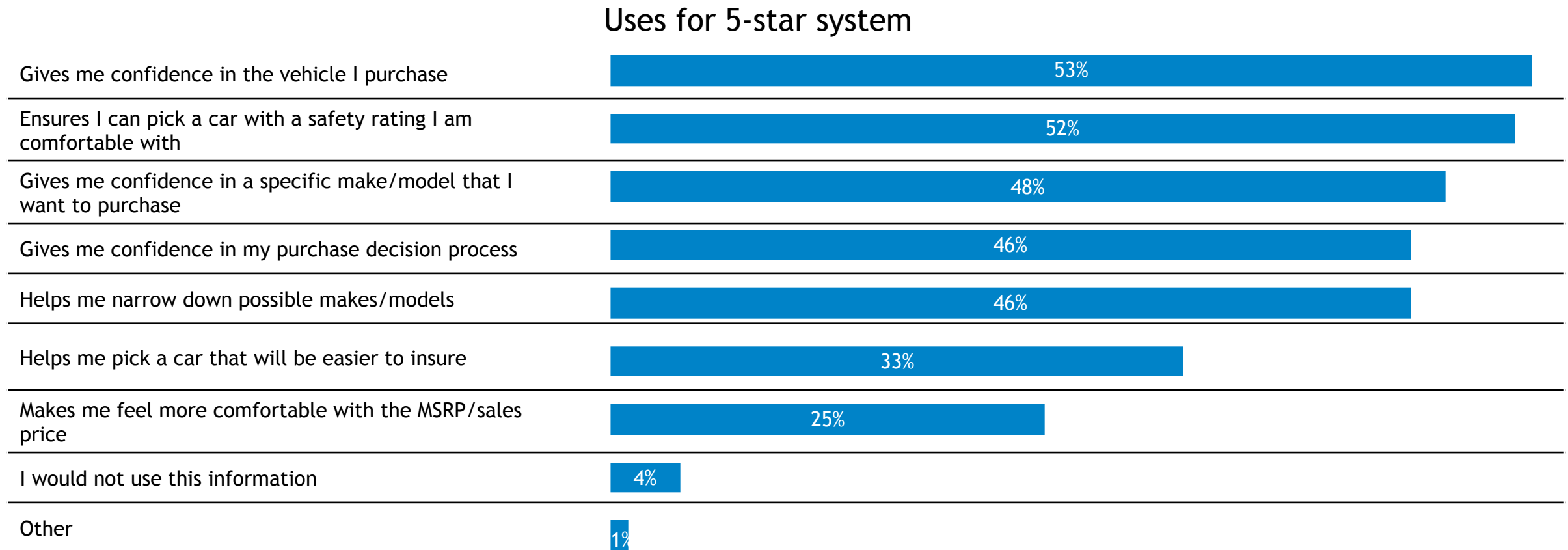


**5-star safety rating is extremely/very valuable**

- Hispanic (82%)
- Unaware of NHTSA.gov (81%)
- African-American (78%)
- College or higher (78%)
- Visited dealership/test drove (78%)
- Children in HH (77%)



# The 5-star system gives confidence to consumers and assures that they are selecting the right vehicle for themselves.



Overall, the current design of the ratings information on the window sticker is clear and helpful. Consumers also think it's relevant and should stand out.

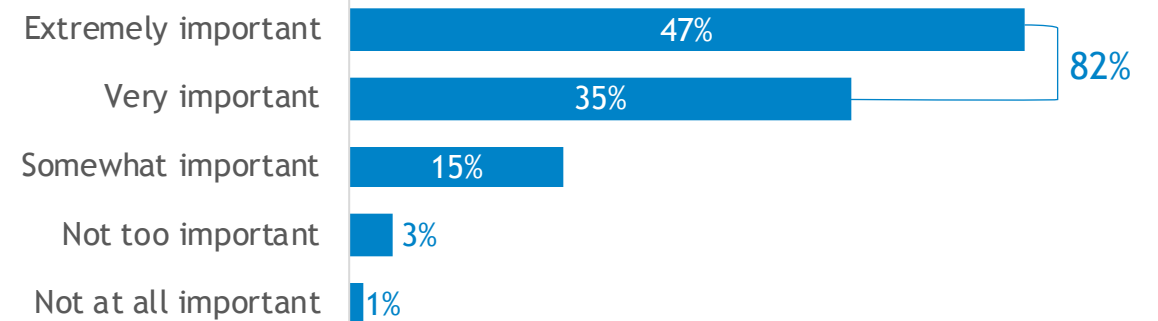
Groups more likely to think inclusion of ratings is extremely/very important

- Safety is top 3 consideration (93%)
- Advanced safety tech is top 3 consideration (93%)
- Unaware of NHTSA.gov (88%)
- Seeking info (87%)
- College or higher (86%)
- North census region (86%)
- Employed (85%)

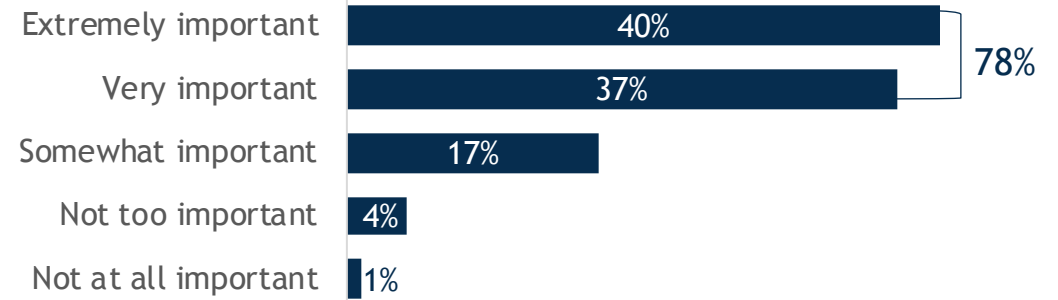
Groups more likely to think ratings need to stand out on sticker is extremely/very important

- Advanced safety tech is top 3 consideration (87%)
- Safety is top 3 consideration (86%)
- Unaware of NHTSA.gov (84%)
- Hispanic (85%)
- Children in HH (82%)
- Divorced/Separated/Widowed (81%)

Importance of Including



Importance of Standing Out



# Consumers want to see information related to the advanced safety tech features on the window sticker, albeit not as much as the safety ratings.

Evaluation of 5-star ratings on window sticker	% Extremely/very important
Importance of inclusion	82%
Importance of standing out	78%
Evaluation of advanced safety technology features on window sticker	% Extremely/very important
Importance of inclusion	72%
Importance of standing out	71%

Groups more likely to think inclusion of advanced safety technology features is extremely/very important

- Advanced safety tech is top 3 consideration (90%)
- Unaware of NHTSA.gov (83%)
- Safety is top 3 consideration (81%)
- Seeking info (77%)
- College or higher (77%)
- Primary decision maker (75%)
- Children in HH (75%)

Groups more likely to think advanced safety technology features need to stand out on sticker is extremely/very important

- Advanced safety tech is top 3 consideration (87%)
- Unaware of NHTSA.gov (82%)
- Hispanic (80%)
- Entertainment/interior tech features are top 3 consideration (80%)\*
- Safety is top 3 consideration (79%)
- African-American (79%)
- Children in HH (78%)
- Visited dealer/test drove (75%)
- Employed (74%)
- Seeking info (74%)
- College or higher (74%)

The image shows a detailed Ford window sticker for a 2013 Ford Taurus. Key sections include:
 

- Vehicle Description:** 2013 SE FWD 4-Door Passenger Sedan with 2.3L I4 Engine and Speed Select Transmission.
- Exterior Color:** Silver Metallic.
- Fuel Economy:** 23 MPG city, 29 MPG highway.
- MSRP:** \$27,740.00.
- Safety Ratings:** Overall Vehicle Score Not Rated, Frontal Impact Not Rated, Side Impact Not Rated, Rear Seat 4 stars, Side Impact 4 stars, Rollover 4 stars.
- Equipment Lists:** Includes exterior, interior, functional, and safety/equipment categories.

# Crash imminent braking and forward collision warning are the two technologies that are familiar to consumers and have a relatively high degree of necessity.

Technology	Familiarity T2B	Necessity TB
<p>A system that is designed to warn a driver when their vehicle begins to move out of its lane (unless a turn signal is on in that direction)</p> <p>Lane Departure Warning</p>	67%	39%
<p>A system that is designed to warn a driver when the vehicle is about to rear end another vehicle or object in front of the vehicle, giving the driver more time to react</p> <p>Forward Collision Warning</p>	66%	45%
<p>A system that automatically applies the brakes when the vehicle is about to impact another vehicle or object in front of the vehicle, assisting if the driver is slow to react to prevent a collision or reduce collision speed</p> <p>Crash Imminent Braking</p>	66%	47%
<p>A system that supplements the driver's braking if the driver does not brake hard enough to avoid a front-end crash into another vehicle</p> <p>Dynamic Brake Support</p>	60%	42%

Base: All respondents (n=1517)

Q35. How familiar are you with each of the following recommended safety technologies in vehicles?

Q36. Thinking about your vehicle purchase, would you say each of the following technologies is a must have, nice to have, or not necessary?

# Additional Thoughts

Additional info wanted	% mentioned
More information related to finance and ratings	4%
Specific technology names	2%
Nothing	4%
Don't know	62%

Base: All respondents (n=1517)

Q41. What additional information can the National Highway Traffic Safety Administration provide about these technologies that would be helpful for you during your vehicle purchase decisions?

# Demographics

# Demographics - SCREENER

		TOTAL
Gender	Male	50%
	Female	50%
Age	18-24	11%
	25-34	18%
	35-44	17%
	45-54	18%
	55-64	18%
	65+	19%
Region	New England	5%
	Middle Atlantic	12%
	East North Central	14%
	West North Central	6%
	South Atlantic	21%
	East South Atlantic	6%
	West South Atlantic	11%
	Mountain	8%
Pacific	16%	
Own/Lease Vehicle	Own	86%
	Lease	10%
	Do not own/lease	6%

		TOTAL
Plans for new/used vehicle	Purchased/lease last 6 months	18%
	Plan to purchase/lease next 6 months	33%
	Plan to purchase/lease next 6-12 months	49%
Purchase phase	Considered purchase, haven't sought out information	30%
	Actively sought out information	49%
	Visited dealership	11%
	Test driven vehicle	4%
	Have decided on vehicle	6%
Decision maker	Primary decision maker	75%
	Shared decision maker	25%

# Demographics

		TOTAL
Education	Less than high school	1%
	High school graduate (12)	19%
	Technical/vocational school	6%
	Some college	27%
	College graduate	36%
	Graduate/professional school	12%
	Prefer not to answer	-
Hispanic/Latino origin	Yes	11%
	No	89%
Ethnicity	Caucasian	79%
	African-American	13%
	Asian-American	5%
	Other	6%
	Prefer not to answer	*
Marital Status	Married/living with partner	59%
	Single, never married	24%
	Divorced/Separated/Widowed	16%
	Prefer not to answer	*

		TOTAL
Employment	Full-time	51%
	Part-time	11%
	Unemployed	6%
	Retired	23%
	Student	3%
	Homemaker/stay-at-home parent	7%
	Prefer not to answer	*
Income	Less than \$25,000	12%
	\$25,000-\$49,999	28%
	\$50,000-\$74,999	21%
	\$75,000-\$99,999	17%
	\$100,000-\$149,999	13%
	\$150,000-\$199,999	5%
	\$200,000+	3%
Prefer not to answer	2%	
Children in HH	None	64%
	1	18%
	2	11%
	3	4%
	4	1%
	5 or more	1%