

2019 Automotive Fuel Economy Survey Report

The Consumer Reports Survey Team conducted a nationally representative survey in June 2019 to assess American adults' attitudes and viewpoints on vehicle fuel economy.



Advocacy

Highlights

August 2019

The American public overwhelmingly supports the goal of national fuel efficiency standards. **88 percent** of adults agree that automakers should continue to improve fuel economy for all vehicle types. However, only **34 percent** think automakers actually care about lowering fuel costs for their customers.



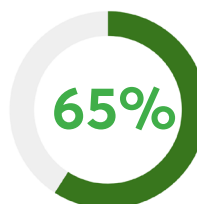
of Americans AGREE that "automakers should continue to improve fuel economy for all vehicle types."



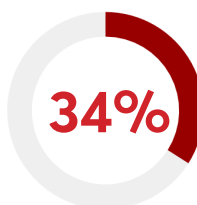
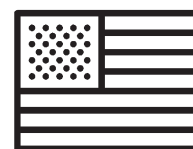
of Americans AGREE that "making larger vehicles such as SUVs or trucks more fuel-efficient is important."



of Americans AGREE that "increasing average fuel economy from 25 miles per gallon (MPG) today to 40 MPG by 2025 is a worthwhile goal."



of Americans AGREE that "the U.S. government should continue to increase fuel-efficiency standards and enforce them, while only 17 percent disagree."



of Americans AGREE that "Automakers care about lowering fuel costs for their customers." Thirty-nine percent disagree, and twenty-seven percent are unsure.



Interest in Improved Fuel Economy

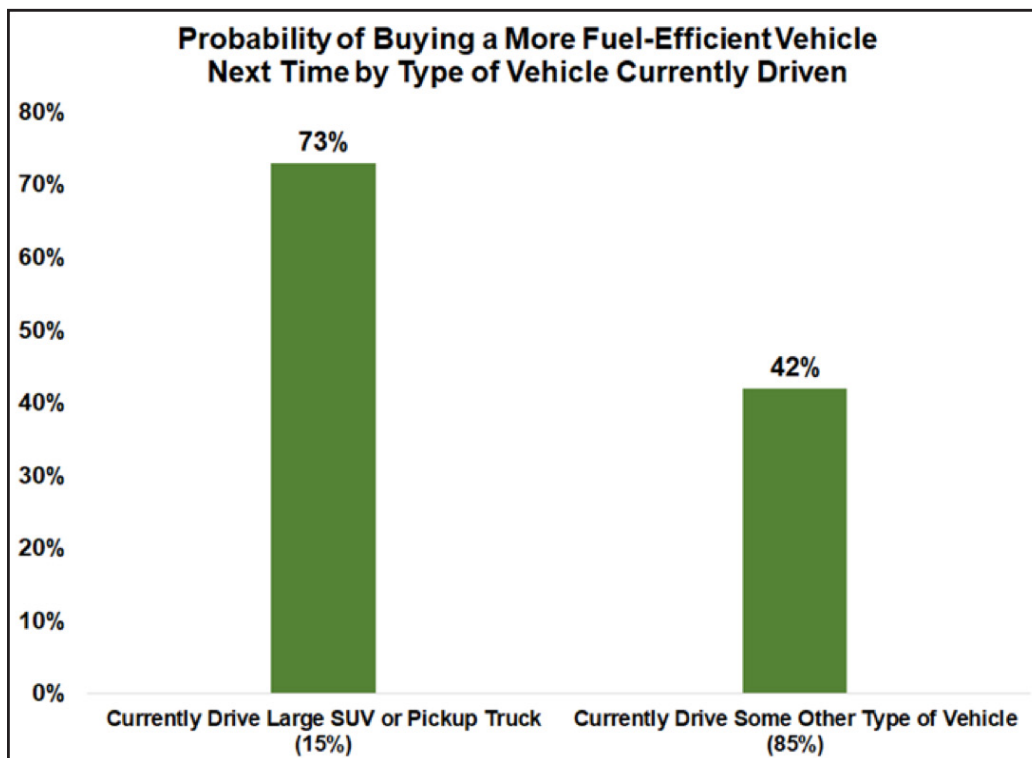
People who drive a 'Large SUV' or 'Pickup Truck' are significantly more likely than other drivers to express interest in buying a more **fuel-efficient** vehicle the next time they buy.

Three Key Takeaways about Large SUV and Pickup Truck Drivers

1. Drivers of vehicles averaging less than 20 MPG are more than twice as likely (**53 percent**) as drivers of vehicles averaging 30 MPG or more (**20 percent**) to select **fuel economy** as an attribute most in need of improvement.

2. Drivers of Large SUVs and Pickup Trucks are almost twice as likely (**55 percent**) as drivers of small or midsize vehicles (**30 percent**) to select **fuel economy** as a desired improvement-attribute.

3. **73 percent** of people currently driving a Large SUV or Pickup Truck express an interest in getting a vehicle that is more **fuel-efficient**, regardless of their assessments of their current vehicle's fuel efficiency.



MPG estimates (right), reported by drivers on their current vehicles, sheds light on consumer demand for fuel-efficient vehicles on their next purchase.

The median value reported for the sample as a whole was 24 MPG.

MEDIAN REPORTED MPG FOR CURRENT CAR	
Small Car	30
Midsize Car	27
Small SUV	25
Sports Car	24
Midsize SUV	22
Large Car	21
Minivan	20
Large SUV	18
Pickup Truck	18

Interest in Improved Fuel Economy

Vehicle owners were asked to select up to three attributes of their current vehicle that “have the most room for improvement.”

Fuel economy (37 percent) is the most commonly reported attribute, followed by maintenance cost (26 percent), purchase price (23 percent), and infotainment or connectivity (23 percent). Fuel economy was the top attribute selected in our 2017 and 2016 surveys as well.

Thinking about your current vehicle, which three attributes have the most room for improvement?	Total	Current Car MPG			Current Car Type			
	%	Less Than 20	20 to 29	30 or More	Large SUV or Pickup Truck	Large Car, Midsize SUV, or Minivan	Small SUV or Sports Car	Small or Midsize Car
			%	%	%	%	%	%
<i>Respondents selected UP to three responses</i>								
Fuel economy	37%	53%	38%	20%	55%	40%	43%	30%
Maintenance costs	26%	27%	25%	26%	20%	25%	27%	27%
Purchase price	23%	26%	24%	18%	38%	22%	18%	20%
Infotainment or connectivity	23%	18%	23%	27%	15%	22%	29%	24%
Passenger room	14%	16%	13%	14%	18%	12%	18%	13%
Off-road capability	13%	12%	13%	13%	13%	7%	10%	15%
Reliability	12%	15%	12%	11%	11%	10%	6%	15%
Cargo space	12%	12%	12%	12%	5%	9%	7%	16%
Vehicle comfort	12%	11%	11%	13%	8%	8%	20%	13%
Horsepower	12%	5%	15%	13%	8%	9%	14%	14%
Vehicle size	10%	7%	9%	14%	7%	10%	12%	10%
Safety	8%	7%	8%	9%	4%	9%	7%	9%
Style	7%	7%	8%	5%	6%	8%	5%	6%
Handling	5%	4%	6%	5%	4%	9%	6%	4%
Base: Americans Who Own and Drive a Vehicle	1,011	264	462	285	132	271	108	492

“Emotional appeals” (95 percent) and “performance-related attributes” (45 percent) appear most prevalently in automotive advertising, according to a previous [recent Consumer Reports analysis](#)¹. Fuel Economy was only mentioned in advertisements about 15 percent of the time, according to that 2018 Consumer Reports analysis. However, that trend is contrary to the priorities consumers say they would like to see improved in this new survey. Attributes, such as horsepower, off-road capability, and style, are only mentioned by respondents 1/3 of the time or less, compared to fuel economy.

¹ What are Automakers Trying to Sell? Fuel Economy and Safety Take a Back Seat
<https://advocacy.consumerreports.org/wp-content/uploads/2018/09/auto-ad-content-fact-sheet-9.19.18.pdf>

Interest in Improved Fuel Economy

The chart below shows a breakdown of improvement attribute interest by Household Income, Region, and Political Party Affiliation.

Fuel economy rates first across each of the three income groups we analyzed, and **ranks first** across all four regions of the country.

Fuel economy rates first across the political spectrum, mentioned most frequently by Republicans (38 percent), Democrats (38 percent), and Independents (36 percent).

Thinking about your current vehicle, which three attributes have the most room for improvement?	Total %	Household Income			Region				Political Party Affiliation		
		Under \$50,000 %	\$50,000- \$99,999 %	\$100,000 or more %	Northeast %	Midwest %	South %	West %	Republican %	Independent %	Democrat %
<i>Respondents selected UP to three responses</i>											
Fuel economy	37%	36%	39%	37%	28%	45%	33%	44%	38%	36%	38%
Maintenance costs	26%	32%	23%	23%	25%	24%	25%	28%	21%	22%	32%
Purchase price	23%	17%	27%	27%	22%	27%	20%	24%	25%	22%	22%
Infotainment or connectivity	23%	23%	23%	21%	18%	18%	24%	27%	26%	21%	21%
Passenger room	14%	15%	13%	14%	18%	13%	17%	8%	16%	13%	14%
Off-road capability	13%	12%	13%	13%	22%	9%	10%	13%	12%	19%	10%
Reliability	12%	15%	11%	9%	14%	7%	13%	15%	10%	14%	14%
Cargo space	12%	13%	9%	15%	11%	10%	12%	13%	12%	13%	11%
Vehicle comfort	12%	11%	14%	10%	12%	11%	14%	10%	8%	13%	14%
Horsepower	12%	9%	15%	11%	12%	13%	10%	13%	11%	12%	13%
Vehicle size	10%	12%	9%	7%	8%	8%	13%	6%	8%	11%	11%
Safety	8%	11%	7%	5%	7%	4%	10%	9%	7%	7%	10%
Style	7%	5%	8%	6%	8%	7%	7%	4%	6%	6%	7%
Handling	5%	7%	4%	4%	5%	4%	6%	5%	6%	8%	3%
Base: Americans who own and drive a vehicle	1,011	446	358	207	129	279	342	261	329	182	499

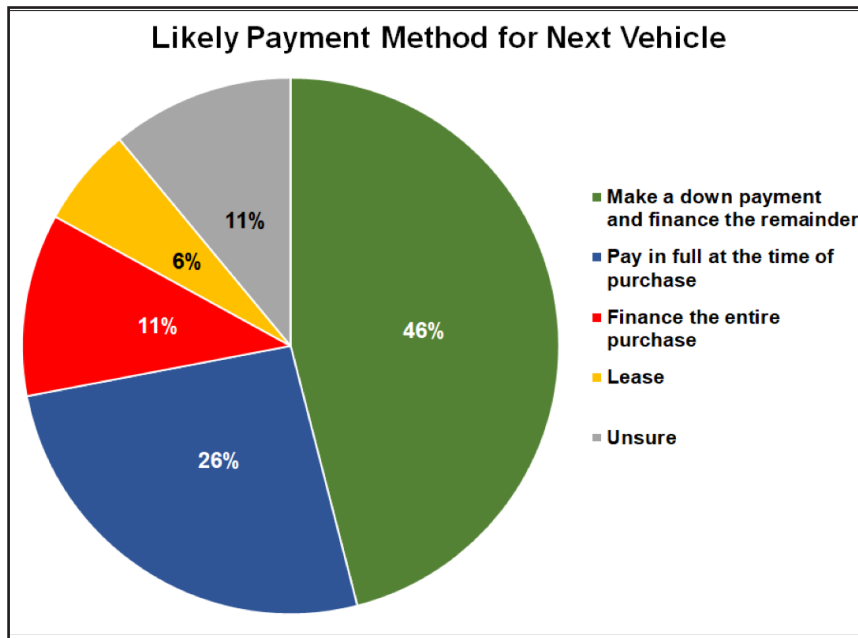
There is an overwhelming majority regarding the desire for strong fuel-efficiency standards, and strong support for fuel economy policies across party identification.

On five of the six items, more than half of Republicans endorse fuel-efficiency goals. The single exception regards government enforcement of standards, and even on this item, 49 percent of Republicans concur that the government should enforce them.

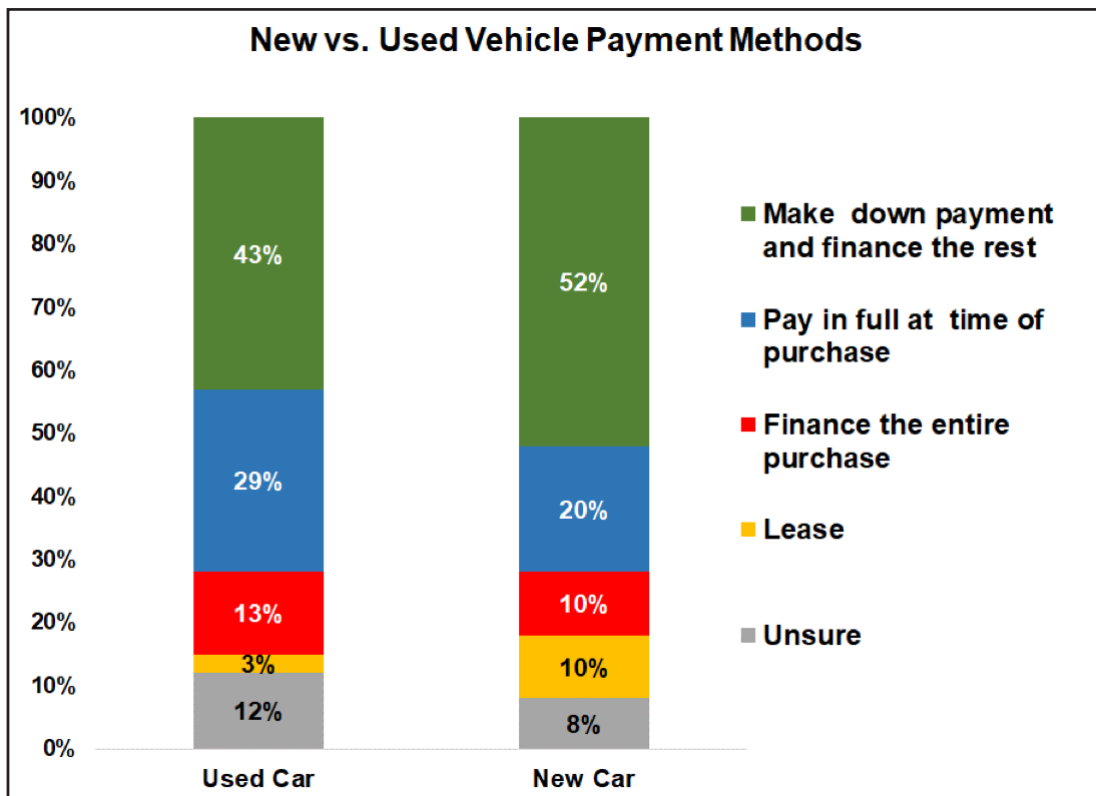
Opinions regarding fuel standards	Total	GOP (34%)	Indeps (21%)	Dems (45%)
Automakers should continue to improve fuel economy for all vehicle types	88%	85%	86%	90%
The U.S. government should continue to increase fuel-efficiency standards and enforce them.	65%	49%	56%	81%
I'm willing to pay extra for a more fuel-efficient vehicle if I can recover additional cost through lower fuel costs within 5 years.	62%	58%	49%	71%
Making larger vehicles, such as SUVs or trucks, more fuel-efficient is important.	86%	83%	81%	90%
Increasing average fuel economy from 25 miles per gallon today to 40 miles per gallon by 2025 is a worthwhile goal.	80%	77%	70%	88%
Reducing domestic oil consumption provides national security and reduces the power of oil-rich nations and organizations.	64%	58%	57%	73%

Paying for Next Vehicle Purchase

Nearly half (46%) of all drivers expect to make a down payment for their next vehicle and finance the remainder of the cost. Over a quarter (26%) expect to pay in full at the time of purchase. Only 6% plan on leasing their next vehicle.



Prospective new vehicle buyers are significantly more likely than are used vehicle buyers to say they will make a down payment and finance the rest of the cost (52% vs. 43%). Prospective used vehicle buyers, on the other hand, are more likely to indicate that they intend to pay in full at the time of purchase (29% vs. 20%). Leasing is an option that new vehicle buyers are three times as likely to consider as are used vehicle buyers. Yet, even among likely new vehicle buyers, this only accounts for 10% of intended purchases.



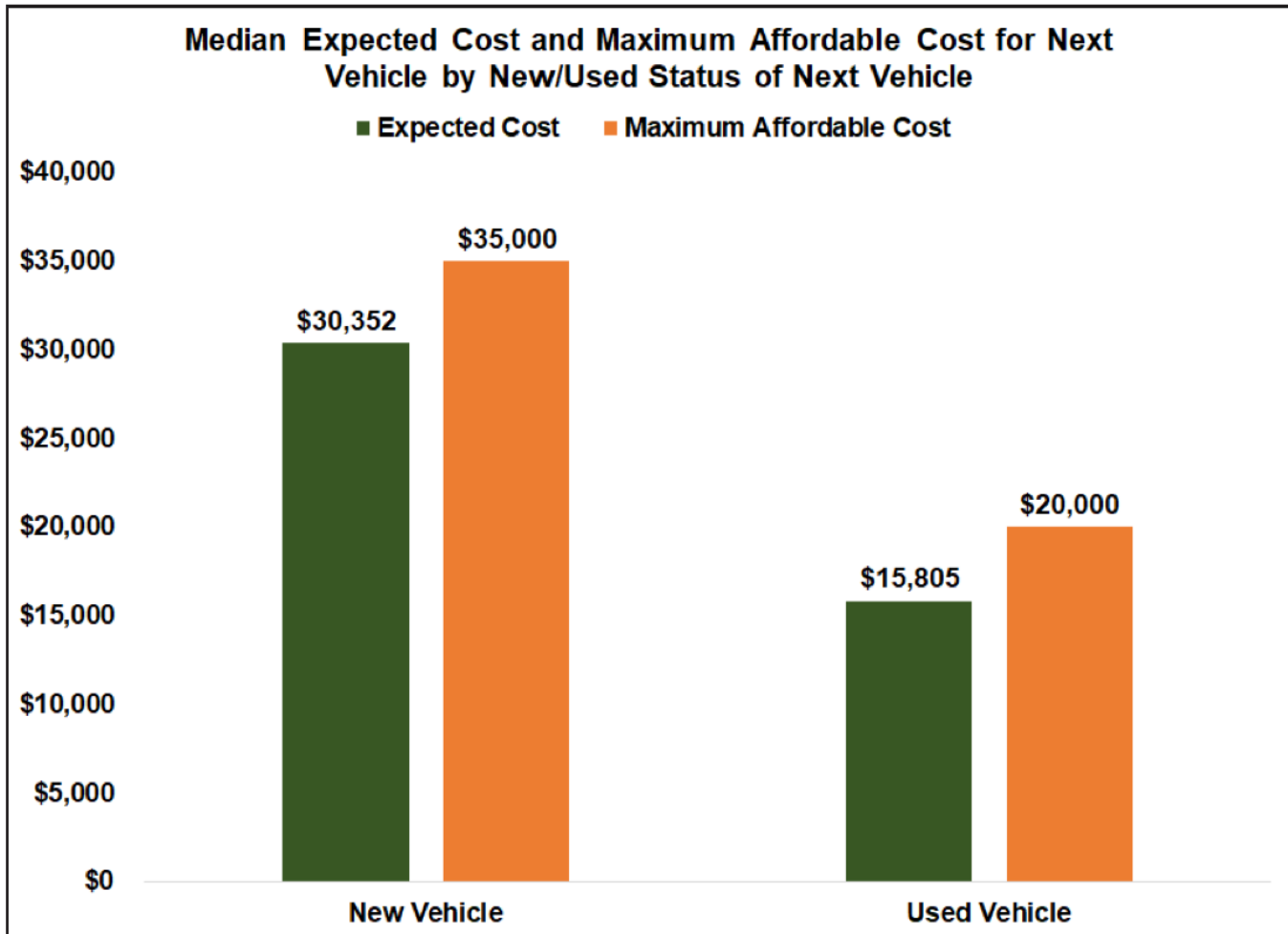
Expected Purchase Price of Next Vehicle

The median price drivers expect to pay for a **new** vehicle is **\$30,352**, and the maximum they say they can pay is \$35,000.

The median price drivers expect to pay for a **used** vehicle is **\$15,805**, and the maximum they say they can pay is \$20,000.

Recent *Kelley Blue Book*² data indicates that the estimated average transaction price for a new vehicle is \$36,113. This is higher than the amount of money potential new vehicle buyers anticipate spending on their next vehicle, but closely approximates the median amount of \$35,000 they say they could afford to spend (maximum) on their next vehicle.

The chart below compares drivers' median expected costs with the median maximum amount they told us they could afford to spend for the next vehicle.



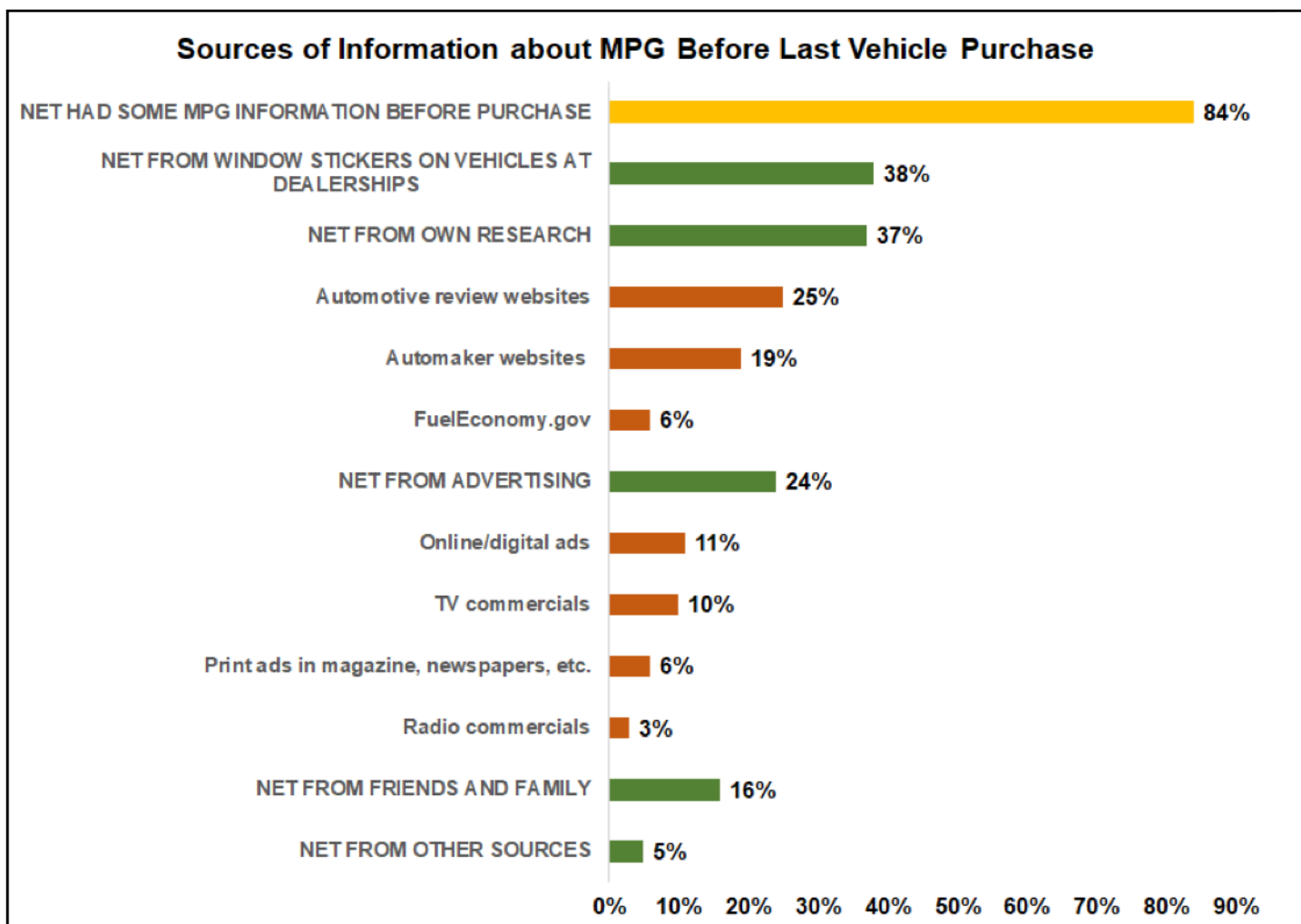
2 Average New-Car Prices Set Record High, Up Nearly 2 Percent In December 2017, According To Kelley Blue Book; <https://www.prnewswire.com/news-releases/average-new-car-prices-set-record-high-up-nearly-2-percent-in-december-2017-according-to-kelley-blue-book-300576732.html>

Sources of MPG Information

Most vehicle owners had some miles per gallon (MPG) information before they bought their current car, but many of them may have already selected their preferred model by that stage.

The two most common sources for finding out about a vehicle's MPG information before buying or leasing it was from the **window sticker at a dealership (38 percent)** and **independent research on the Internet (37 percent)**.

16 percent of vehicle owners say they **didn't obtain any information** about their current vehicle's MPG before purchasing or leasing it.



Vehicle Uses

When we asked drivers about the two most common uses of their vehicles, two activities stand out from all others:

- Running errands (63%)
- Commuting to work (56%)

These findings reflect, to a large degree, the highly lopsided uses reported by retired American drivers. The table below breaks down responses by currently employed drivers vs. those who are retired, as well as household with minors vs. those without minors. Retirees are far more likely to mention errands (79% vs 55%), road trips (35% vs 13%), and recreational activities (19% vs 9%) than are those currently employed. Conversely, currently employed drivers are much more likely to mention commuting to and from work (73% vs 11%).

Findings for households with kids are also included in the table to highlight the emphasis placed by these drivers on the use of their vehicles to transport kids to and from school (31% vs. 13% of the general population of drivers, and 7% for households without kids).

Which of the following are the two most important uses for your vehicle?					
<i>Select UP to two responses</i>	Total %	Employed %	Retired %	HH with Kids %	HH without Kids %
Running errands (e.g., shopping, going to appointments)	63%	55%	79%	56%	66%
Commuting to and from work	56%	73%	11%	71%	52%
Road trips or vacations	17%	13%	35%	11%	19%
Driving children to and from school	13%	16%	2%	31%	7%
Recreation or entertainment	12%	9%	19%	10%	12%
Carrying cargo (e.g., luggage, equipment)	6%	6%	7%	1%	8%
Towing (a boat, trailer, etc.)	4%	4%	6%	1%	5%
Other	3%	2%	3%	0%	4%
Base	1,011	634	206	201	300

Tax Policies

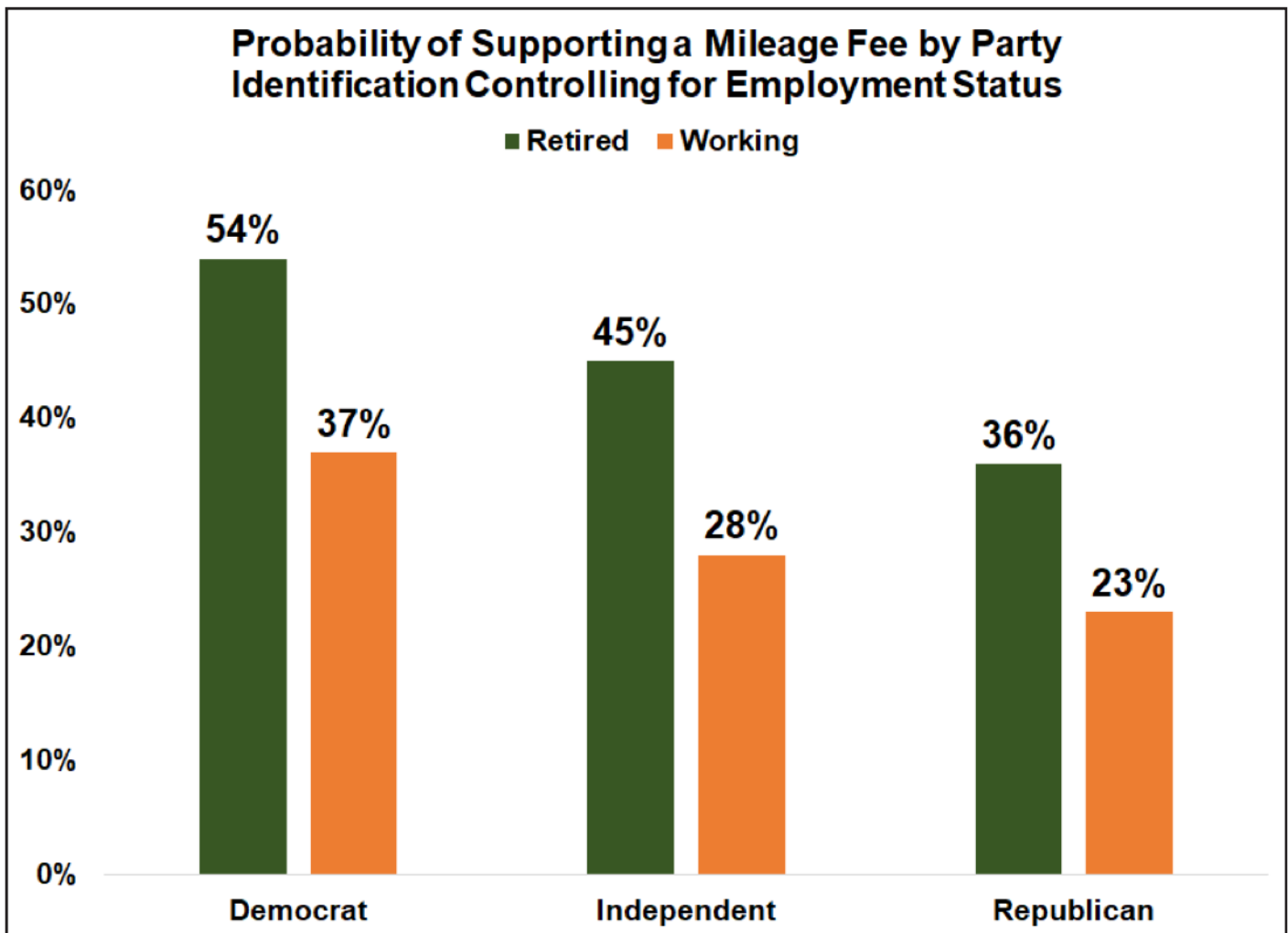
We asked Americans whether the government should use **mileage fees** (based on amount of miles driven) or **gas taxes** (based on amount of gas used) to raise money for highway construction and maintenance.

Opinion is evenly split: 36% favor mileage fees, 36% favor gas taxes, and 28% are unsure.

We didn't ask respondents the number of miles they drive annually, but the two best available indicators of preference are whether a person is working or retired, and their political sentiments.

Our probability model indicates that support for a mileage fee is only 30% among currently employed Americans, but 46% for retired Americans.

The chart that follows depicts how employment status and partisanship interact as predictors of support for a mileage fee. What stands out in this chart is that retired Democrats are most in favor of being taxed based on a mileage fee as opposed to gas tax, while currently employed Republicans are least in favor of this idea.



We found no correlation between mileage fee opinions and perceived fuel efficiency of current vehicles. We also found no significant relationship between mileage fee opinions and the mpg reported for drivers' current vehicles.

Methodology

This survey was administered from June 18 to June 27, 2019. The nationally representative sample consists of 1,078 American adult residents (972 surveys were administered online and 106 interviews were conducted by phone). The 1,011 respondents who screened in to the main survey are currently licensed drivers who own a vehicle.

Findings presented in this report represent analyses of data after weighting was applied to respondent-level data to approximate Census-based estimates. Data are weighted based on demographic and geographic benchmarks established by the most recent U.S. Census Bureau's and U.S. Bureau of Labor Statistics' Current Population Survey.

The margin of error on the weighted data, when accounting for a design effect of 1.94, is +/- 4.16 percentage points at the 95% confidence level for the nationally representative sample of 1,078 U.S. residents.

