



3DAYCAR PROGRAMME

New Car Buyer Behaviour

Research Survey Report

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Summary

- This report details the results of a survey of new car buyers which aimed to understand their buying needs and behaviour in relation to build-to-order and short delivery lead times. It was part of a research programme that examined the nature of demand for a 3DayCar
- Over 1000 private new car buyers, representing 70% of the makes bought in the market in 2000, responded to a self-completion questionnaire distributed at certain points in 2000. The final sample is broadly representative of the UK motoring population in terms of region, age, sex, though there are slight differences. 94% of the sample were private buyers and 61% traded in a car as part of their purchase. Around 88% of the sample bought 'volume' cars, while 12% bought specialist cars.
- Brochures (1st ranked), dealer sales staff (2nd), car magazines (3rd) and friends/relatives (4th) were the most common sources of new car information sources used. The internet was used by just under one fifth, and particular by those aged 25 to 35 years. [section 3.1]
- Two thirds of respondents took up to 1 month from the time of their decision to buy a car to making an order. Volume buyers took less time than specialist buyers, and there were marked differences across brands. Two thirds of respondents said that waiting time was important to their choice of vehicle, with younger buyers more likely to say this [section 3.2]
- 76% of respondents said their car was delivered up to 1 month after making the order with the dealer. Specialist buyers waited longer, and there were marked differences across brands. [section 3.3]
- Just under a quarter of respondents said they took an alternative specification to one they initially had in mind (which was not available for some reason). More specialist buyers took alternatives than volume buyers. Mazda, Toyota, Lexus, Citroen and Peugeot buyers were less likely to compromise, while buyers under 25 had a high propensity to change specification. [section 3.4]
- Colour or paint type was the most popular type of specification change, and 46% of those who compromised said they received some form of benefit from the dealer for doing so – predominantly a discount on their new cars, followed by specification upgrade. There large differences across the brands in the benefits offered. [section 3.4].
- The most common day for making an order was Saturday, and the most common day for collecting the new car was Friday. Most orders and collections were made in the afternoon, though nearly 20% said they collected their cars in the evening [section 3.5].
- On average, new car buyers contacted or visited their dealer 3.5 times when purchasing their car [section 3.6].
- 59% of respondents said the ideal time for receiving their car after order was up to 2 weeks, with 81% saying the new car should be delivered up to 3 weeks after the order. This is probably a much shorter time than commonly thought by the industry. [section 3.7]
- There were marked differences between volume and specialist buyers in ideal time, with 22% of volume buyers wanting their car delivered in a week, compared to 9% of specialist buyers. Age of buyer also showed significant variations, with 84% of those under 25 saying that order to delivery should be 2 weeks or less. Regarding brand,

buyers of Ford's, Citroens and Fiat's had particularly short lead time expectations, while buyers of Audi's, BMW's and Jaguar's had the longer expectations. [section 3.7]

- Key themes that emerged from the results included the differences in attitudes and behaviour of younger car buyers, and differences between volume and specialist buyers.
- Younger car buyers are much more impatient than older buyers and more predisposed to changing their behaviour to ensure they are 'instantly gratified'. This group of consumers can be considered as the 'natural' 3DayCar customers.
- Specialist buyers are prepared to wait longer for their cars, with the suggestion that they make a clear link between *quality* and *time* – that is, a premium car by its nature will take longer to make and deliver. While technically there should be little difference in manufacturing and delivery time for both volume and specialist cars, it can be argued that the current marketing and sales system exploits and reinforces this outdated belief. This has implications for any potential 3Daycar the marketing message to specialist buyers.
- Overall, the research suggests that order to delivery time matters to new car buyers, that consumers expectations are high in terms of a short lead time, and that there is a latent 3DayCar potential to be exploited.

1 Introduction

1.1 Report Purpose & Context

This report details the results of a survey of private new car buyer behaviour. It forms part of the Marketing Stream work of the 3DayCar Programme, which aims to understand consumer needs and behaviour in terms of the reconfiguration of the new car supply system as a result of a move towards shorter order lead times, build-to-order and *customer pull*.

The report is divided into sections covering research methodology, analysis of results and conclusions. Note that 3Daycar researchers' comments on the findings are included at various points in the analysis, and are indicated with a **green background**.

1.2 Research Objectives

The overall aims of the project were to assess the nature of demand for short lead times for new cars, and to provide a reliable understanding of private new car buyers' behaviour and attitudes, particularly in relation to the length of time that is taken in the various stages of the new car buying process. It also aimed to quantify a number of important aspects of the buying process, including:

- Time taken to make and receive an order
- The length of time buyers think they should wait for a car to be delivered
- The level of specification compromise that takes place
- Identify differences in behaviour by various criteria such as brand, age, location etc.
- The major sources of information used by consumers.

2 Methodology

2.1 Research Approach

Around 3,000 self-completion questionnaires were mailed to recent new car buyers, over 12 months from October 2000. Access to the buyers was obtained from the students of Cardiff Business School's Automotive Retail Management Programme, (franchised car dealers with access to customer databases), and from selected dealer sponsors of the 3DayCar programme.

The questionnaire contained 13 questions, most of which required a 'tick box' for the respondents' answers. Appendix I contains the questionnaire.

An accompanying letter was sent with the questionnaire (see Appendix II). This was personalised, and on the appropriate dealer's headed paper.

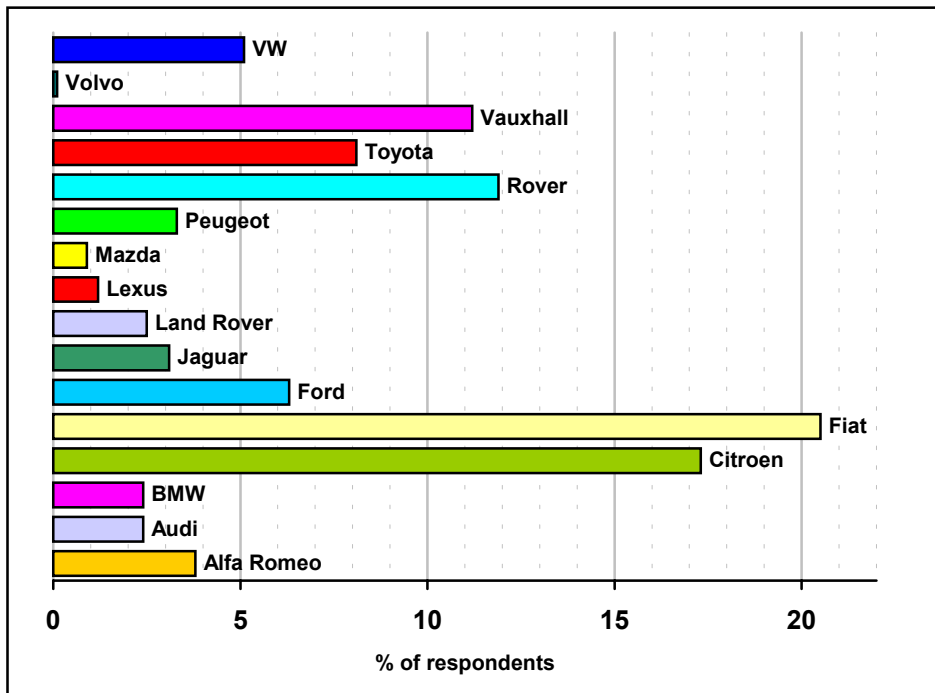
There was an incentive to respond, with ten £10 Marks & Spencer gift vouchers available from a draw of all respondents (provided they returned their questionnaires by a specified date). A freepost envelope was also provided (addressed to the Business School).

2.2 Response Rate

A total of 1,233 replies were received, though due to a disproportionately high number of Fiat owner responses, this was scaled back to 1,030 for initial analysis. The particularly high response rate (30%+) is considered to be due to a number of factors, including:

- The saliency of the new car purchase
- The use of a dealer letter head along with personalisation
- An incentive to respond
- The connection with a university – implying impartiality and independence
- The use of a simple, well designed questionnaire
- A freepost return envelope

A breakdown of the responses by manufacturer is shown below:



To ensure that the results were representative of the new car buying population, the 1,030 responses were weighted according to market share data for 2000, as indicated in the table below. A weighting factor was then applied to the responses for each manufacturer

Manufacturer	Market share 2000	% of sample (weighting ratio)
Alfa Romeo*	0.44%	1%
Audi*	1.94%	3%
BMW*	3.05%	4%
Citroen	3.80%	5%
Fiat	4.23%	6%
Ford	16.85%	24%
Jaguar*	0.68%	1%
Land Rover*	1.50%	2%
Lexus*	0.40%	1%
Mazda	0.90%	1%
Peugeot	8.51%	12%

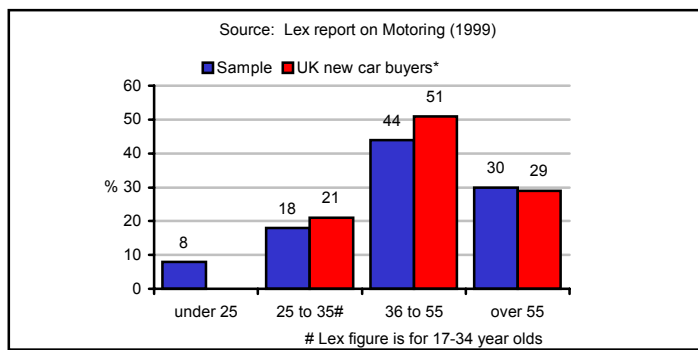
* For the purpose of results analysis, these manufactures were grouped together to represent **specialist** brands, while the remainder represented **volume** brands

Manufacturer	Market share 2000	% of sample (weighting ratio)
Rover	4.67%	7%
Toyota	3.76%	5%
Vauxhall	13.35%	19%
VW	7.01%	10%
Total	71.09%	100%

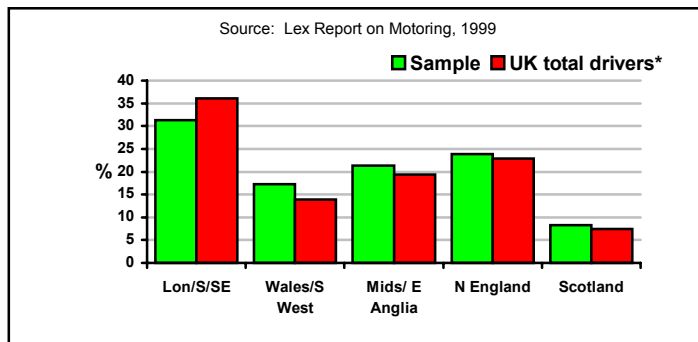
The results are therefore representative of 71% of new car buyers in 2000.

2.3 Respondent Profile

The profile of survey respondents in terms of age, region and sex is indicated below.



Age breakdown of survey respondents compared to UK car buyers



UK regional breakdown of survey respondents compared to UK car buyers

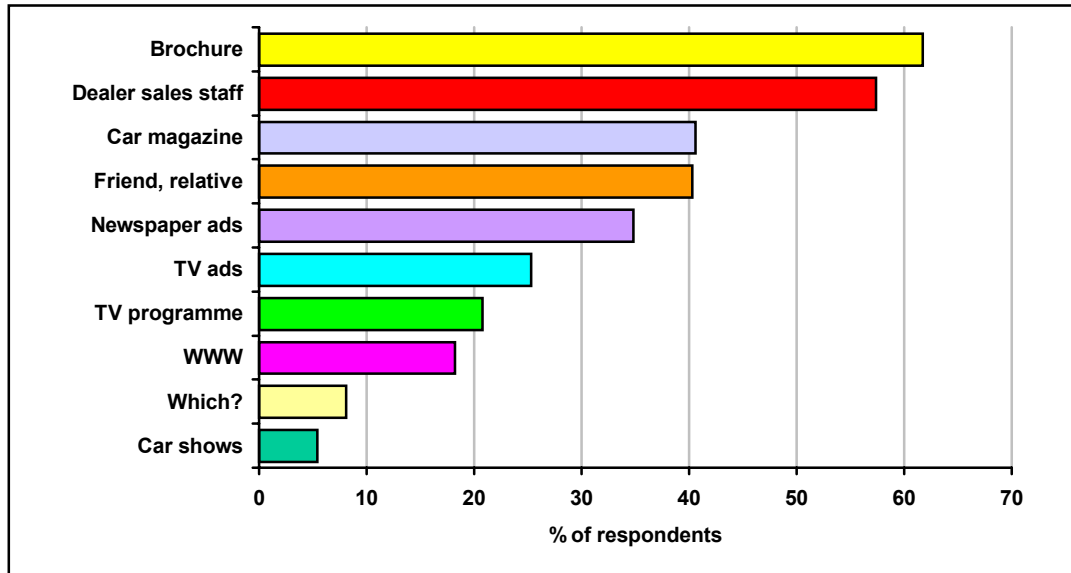
The sample was biased in favour of females, as 41% were female, compared to 33% of all UK buyers¹. 34% of respondents had one car in their household, 49% had two, while 17% had 3 cars in their household. Private buyers represented 94% of respondents, and 61% traded in a car when buying their new car. The new cars were purchased throughout 1999 and 2000, with 22% in March and 38% in September, reflecting the seasonal sales peaks, as well as the dates of the circulation of the questionnaires.

¹ Lex Report on Motoring, 1999

3 Research Results

3.1 Information Sources Used

Respondents were asked to record the information sources they had used to find out about the car they bought and others considered. Ten different sources were listed, and they were able to tick as many as appropriate. The chart below details the responses.



Respondents were also asked to select the 3 most important sources to them, and by assigning a value to each (3 for the most important, 2 for the second most important etc), total scores were obtained showing the four most important sources, namely **brochure**, **dealer sales staff**, **friend** and **car magazine**.

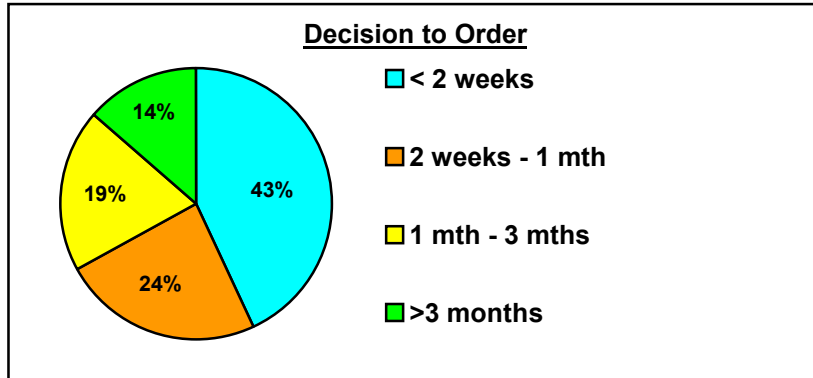
Analysing information sources by age of respondent, young owners (<25 years) had a particularly high propensity to use **friends and relatives**, the **TV** (advertisements & programmes), and the **web**. The highest users of the web were those aged 25 to 35, who were also more likely to use TV programmes as a source. Those aged over 55 had no particular predispositions to use or not use particular sources, except the web, where there was very low usage, and they were less likely to use the TV as an information source.

Regarding sex and sources used, males were more likely to use **magazines**, and women more likely to use **friends or relatives**.

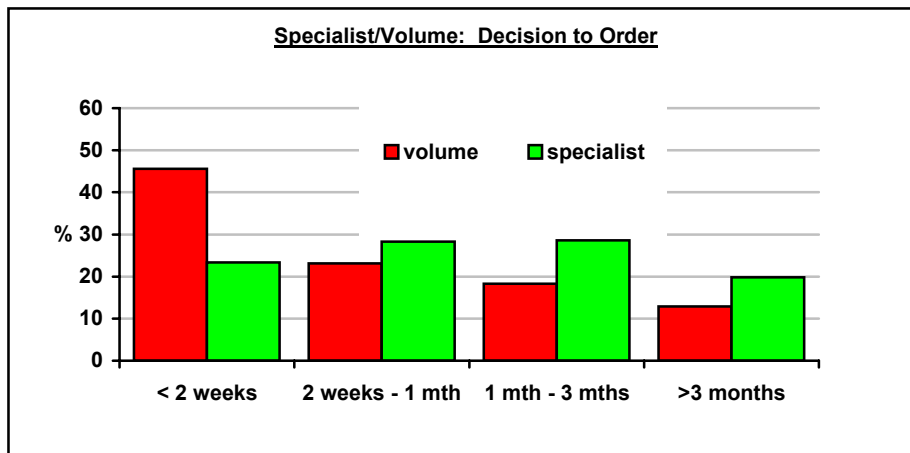
Comment: *The role of 'traditional' sources of information – dealer sales staff and the brochure - remain important, despite the popular (negative view) of dealers and their sales techniques. The 'word of mouth' factor and reliance on other peoples' opinions is strong, especially among younger buyers, who probably have less experience or confidence in buying new cars. While the web figure is comparatively low, it is probably increasing rapidly in a short period of time to reach this level (and may continue rising, especially as younger buyers are more predisposed to use the web).*

3.2 Length of Time From Decision To Order

Respondents were asked to state the **length of time** between their **initial decision to buy** a car and **placing the order** at the dealer. Four options were given, and the results are shown below:



While some **two thirds** of all respondents took up to **1 month** to make the order at the dealers, there were some significant differences between buyers of volume and specialist brands, as the chart below indicates:



Buyers of specialist brands were more likely to take longer in their decision making, and indeed, twice as many volume buyers took **2 weeks or less** from decision to order. On average, specialist buyers took nearly **6 weeks** (with one fifth taking over 3 months), while volume buyers took around **4½ weeks**.

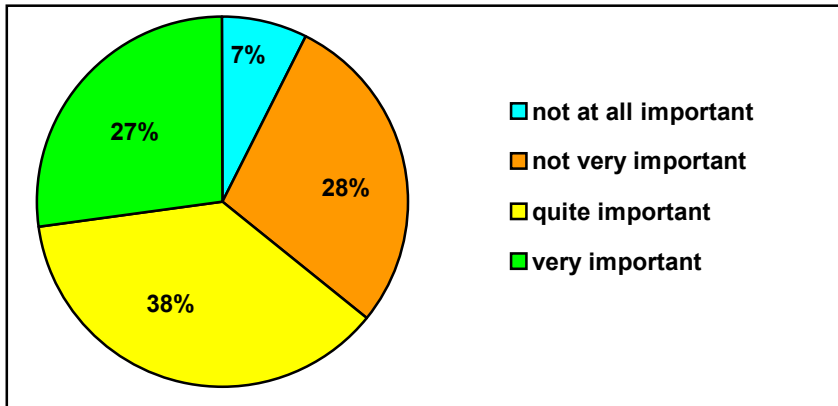
There were significant differences among the brands in terms of length of time from decision to order. Of the volume brands, **Volkswagen buyers** took a particularly long time, and the number taking more than **3 months** was more than double the sample average. Similarly, **Vauxhall buyers** had a lengthy decision making process (**>3 months** 1½ times the sample average), while **Peugeot buyers** had a very high propensity to take between **1 to 3 months**. At the other end of the scale, **Ford buyers** took a very short time to make their decision and order, and had the highest proportion of buyers taking less than **2 weeks**. Rover and Citroen buyers, to a lesser extent, also fell into this category.

Of the specialist brands, buyers of **Jaguar's**, **BMW's**, and **Audi's** tended to wait the longest between decision to order. Land Rover customers exhibited behaviour more like the volume

buyers, while no **Lexus buyers** waited 3 months or more and largely fell into the 2 weeks to 1 month and 1 month to 3 months categories.

Importance of Waiting Time

Respondents were asked how important waiting time was to their choice of vehicle, with the results shown below:



◀ "How important was waiting time to your final car choice?"

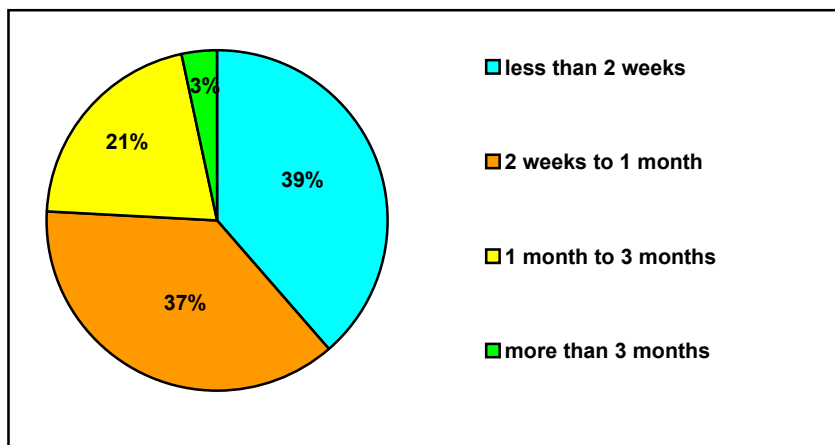
Around **two thirds** of all respondents said it was important to some extent, though there were some differences among different age groups and volume/specialist buyers. Younger buyers **under 25** were far more likely to say this was important, while there was little variation from the norm among other age groups. Specialist brand buyers were slightly more likely to say it was important, compared to volume buyers.

Comment: *The time it takes to make an order is likely to be linked to popularity/availability of particular models, the overall effectiveness of manufacturers' ordering and delivery systems, and the conditioned behaviour of specialist buyers, who take longer to decide on their car. It's a bigger financial commitment, and there are often more options to choose*

t t

3.3 Time From Placing Order to Taking Delivery

Respondents were asked to indicate the length of time from placing their order to taking delivery of their car. The results for the total sample are shown below:



◀ "How long did it take from order to delivery of your car?"

76% of the sample claimed to have had their car delivered up to **one month** after making the order with the dealer. Specialist brand buyers tended to wait longer, for example, **33%** of specialist buyers waiting less than **2 weeks** compared to **39%** of volume buyers. Similarly, **35%** of specialist buyers waited over **1 month**, compared to **23%** of volume buyers.

Once again, there were some significant differences among the individual brands on waiting time between order and delivery. Regarding volume brands, a very high proportion of **Volkswagen buyers** waited more than **3 months**, with more than twice the sample average waiting for this period. Similarly, **Vauxhall customers** waited significantly longer than the average, while those purchasing **Peugeot's** waited more than twice the average for **1 to 3 months** (though no buyers waited 3 months or more).

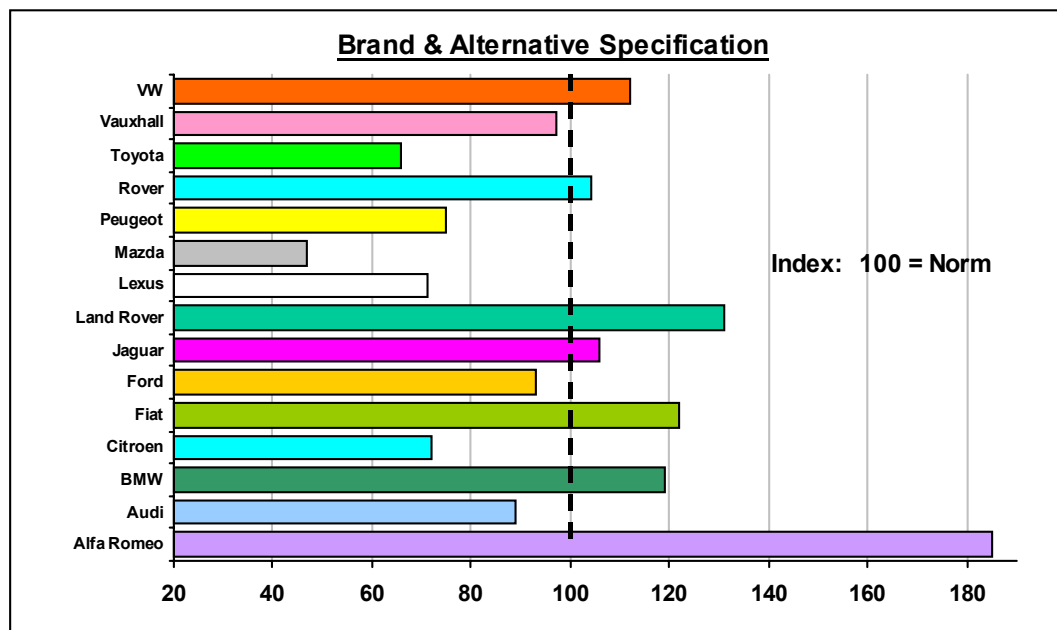
More **Ford** customers than any other manufacturer waited **2 weeks** or less, and **Citroen, Fiat** and **Rover** customers also had high representation in this category. With the specialist brands, **BMW, Jaguar** and **Audi** buyers all had significant representation in the 1 to 3 months and more than 3 months categories, though **Lexus** and **Land Rover** had no one waiting more that 3 months for their cars.

Comment: Factors noted in section 3.2 on length of time from decision to order also apply to this area. The popularity of certain models - and hence their availability – clearly has an influence here, as does the effectiveness of the various new car supply systems. Again, the difference between volume and specialist buyers is marked, with specialist cars generally taking longer to deliver. This factor probably reinforces consumer expectations and beliefs on the "quality takes longer" issue.

3.4. Alternative Specification Taken

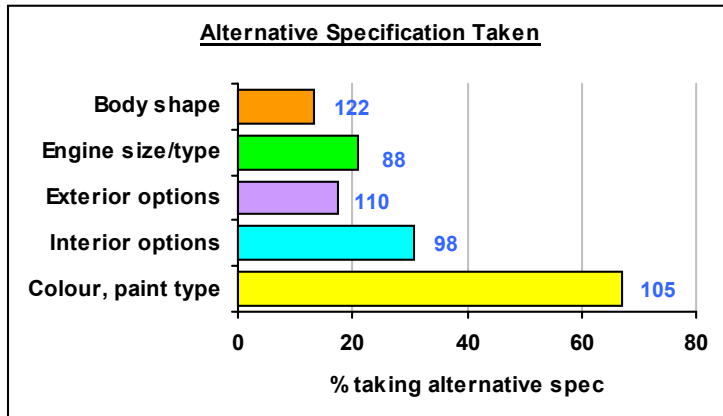
To establish whether customers obtained the car their initial choice, they were asked to state whether they accepted an alternative specification to the model they initially had in mind. This could have been because their preference was not available, or it would take too long to arrive, or because they were persuaded to take an alternative model in stock.

Of all respondents, **22.4%** said that they did take an alternative specification, while **77.6%** said they did not. More specialist buyers took an alternative specification (26.8%) compared to volume buyers (21.8%). Differences across the brands is illustrated below:



The chart above shows each brand’s relative position on alternative specification taken, with the data converted to an index, where 100 equals the total sample average. The further a bar is to the right of the norm (100), the more likely the buyer of the particular brand is likely to have had an alternative specification. So, **Alfa Romeo, Land Rover, Fiat** and **BMW** buyers were most likely to change specification, while **Mazda, Toyota, Lexus** and **Citroen** buyers were least likely.

In terms of age and sex, those **under 25** showed a high propensity to change specification (over 1½ times more likely), and **women** were marginally more likely than men to change specification. Regarding the actual nature of the specification change, respondents were asked to state what was actually changed, the results of which are shown below.

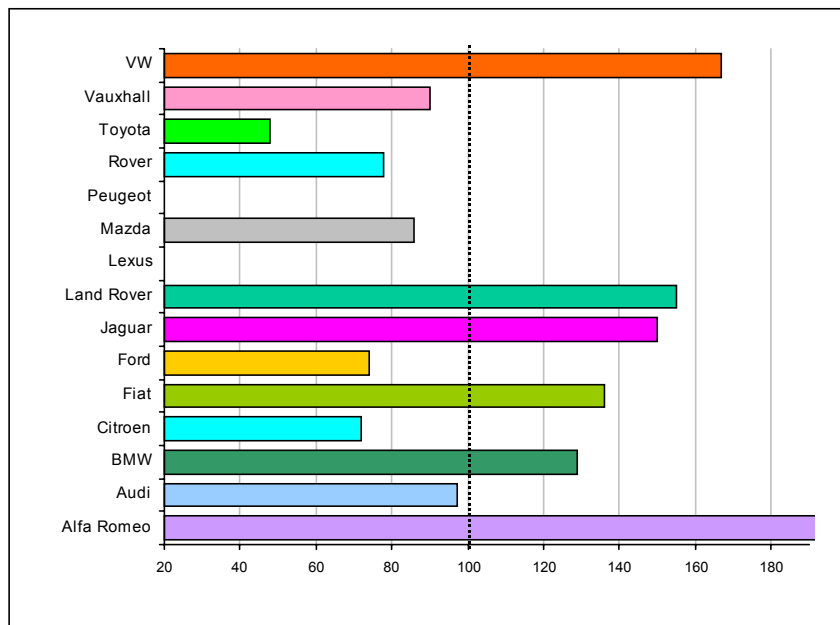


What was the nature of the specification change?

Colour or paint type was clearly the most popular type of specification change, followed by an interior option change. Respondents were also asked whether the change **mattered** to some degree. The results were converted to an index, with the higher the number indicating that the change was more significant in some way. These indices are shown on the chart above (in blue), with a **body shape change** mattering the most.

Respondents who took an alternative specification to their original choice were asked whether they received some form of benefit as a form of compensation, and **46%** said that they did, with **54%** saying they did not. Note that specialist buyers were more likely to receive a benefit, with 58% saying they received a benefit, (45% for volume buyers).

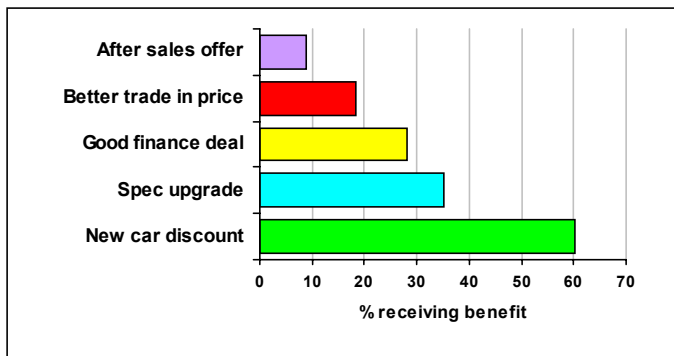
There were significant differences across brands in terms of benefits offered:



Alfa Romeo, VW, Land Rover, Jaguar, Fiat, BMW customers were most likely to receive benefits, while Peugeot, Citroen, and Lexus were least likely.

100=norm

The nature of the benefits taken is shown in the chart below:



*For all who received a benefit due to taking an alternative specification, a **discount** was the most popular received, followed by **specification upgrade**.*

Again, there were differences between volume and specialist brands. **Volume** buyers were most likely to get a **'good finance deal'**, while **specialist** buyers were more likely to get a better **trade-in price**, and be offered a **specification upgrade**.

***Comment:** It can be argued that the 22% who admitted to changing their specification is an underestimate of the tendency, as some consumers may have made a change but not interpreted it as a compromise. The fact that specialist buyers were slightly more likely to take an alternative reflects the more discerning buying stance they take for a high value product, where they are more used to detailing specification, while a stock push franchise customer is used to getting what's in stock*

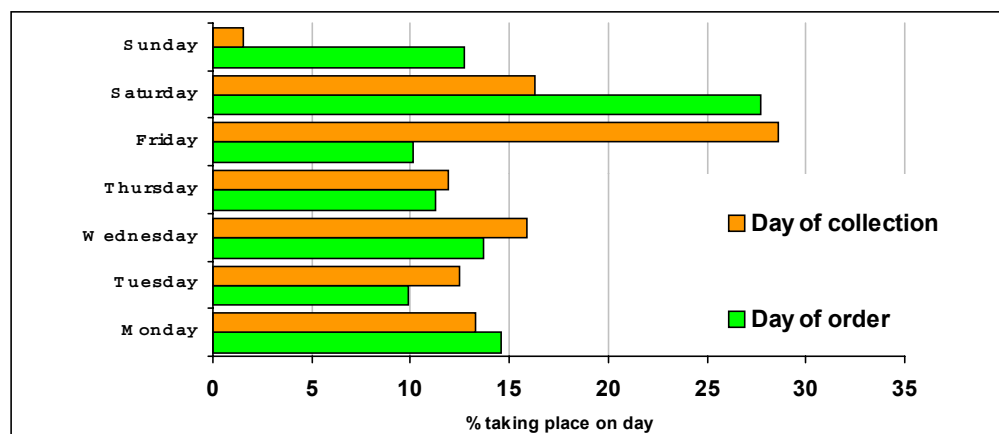
The significant differences in specification change across brands could be due to some brands not offering a wide selection of options (for example, because they are fitted as standard), or because they have an effective option package approach. Again, young buyers readiness to change illustrates that the desire to have a vehicle quickly strongly overrides other factors.

Benefits received by buyers could be linked to individual brand customer service expectations, as well as individual policies. Specialist customers are probably more used to detailing specification compared to volume buyers, so their greater tendency accept an alternative is not surprising.

3.5. Timing of New Car Order and Delivery

Day of Order & Collection

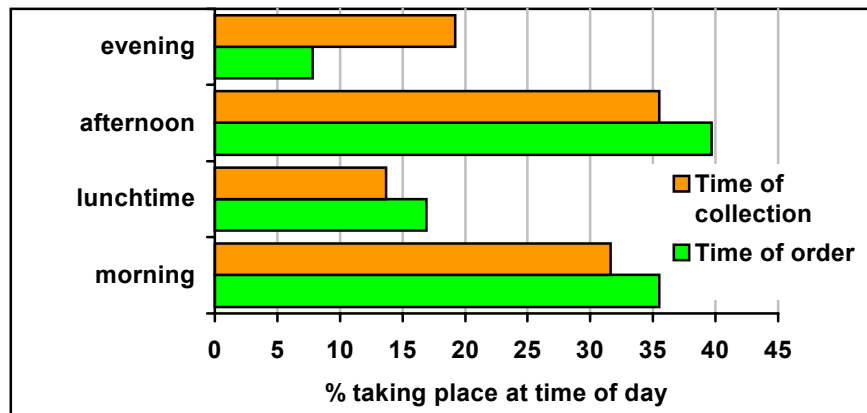
Respondents were asked when they ordered and took delivery of their cars:



Orders – the green bars – were very likely to be made on a Saturday, with a reasonably evenly spread across the other days of the week. Collection days (in orange) were more varied, with Friday by far the most popular day.

Timing of Orders

Respondents were asked when during the day they made their orders and collected their new cars:



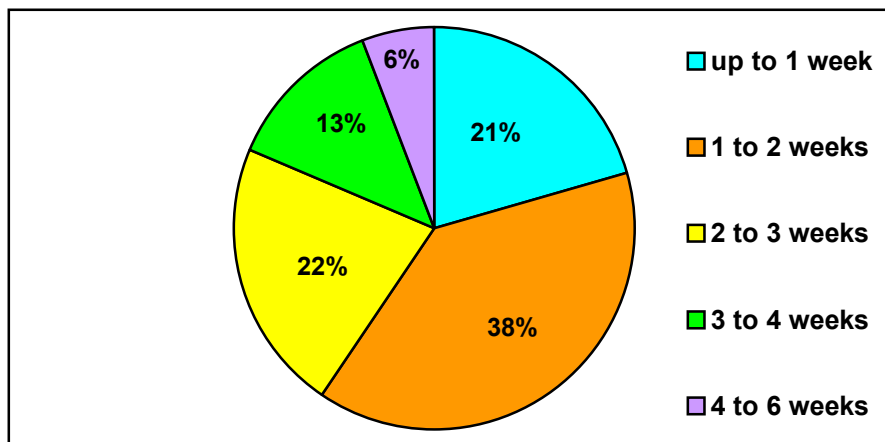
Comment: The weekend is clearly important for ordering and collection activity, with the prospect of being able to experience the new purchase on the traditional Sunday afternoon drive important for many. Saturdays and Sundays appear to be the important 'shopping' period, with around 40% of orders taking place at this time. Finally, with nearly one fifth of collections taking place in evenings, it suggests that dealers have become more flexible in changing their opening hours to meet customers' needs.

3.6. Number of Times Visited Dealer

On average, new car buyers contacted or visited their dealer **3.5** times when purchasing their car, with **45%** contacting/visiting 3 times or less, and **42%** visiting between 3 and 5 times.

3.7. Ideal Length of Time – Order to Delivery (OTD)

To assess how long new car buyers want to wait for the delivery of their new cars, respondents were asked how long – *ideally* – it should take from placing their order to taking delivery of their new cars. The overall results are shown below:



59% of all respondents say that it should take **up to two weeks**, and **81%** maintain that it should be delivered **up to 3 weeks** after the order.

Volume & Specialist Buyers

Again, there are marked differences between volume and specialist buyers, as the table below indicates:

Waiting Time	Volume Buyers %	Specialist Buyers %
Up to 1 week	22	9
1 to 2 weeks	41	23
2 to 3 weeks	22	24
3 to 4 weeks	11	27
4 to 6 weeks	2	17

While **22%** of volume buyers wanted their car delivered in a week, the corresponding figure for specialist buyers was **9%**. On the other hand, **17%** of specialist buyers would be prepared to wait 4 to 6 weeks and **27%** 3 to 4 weeks. The corresponding figures for volume buyers were **4%** and **11%**.

Age of Car Buyer

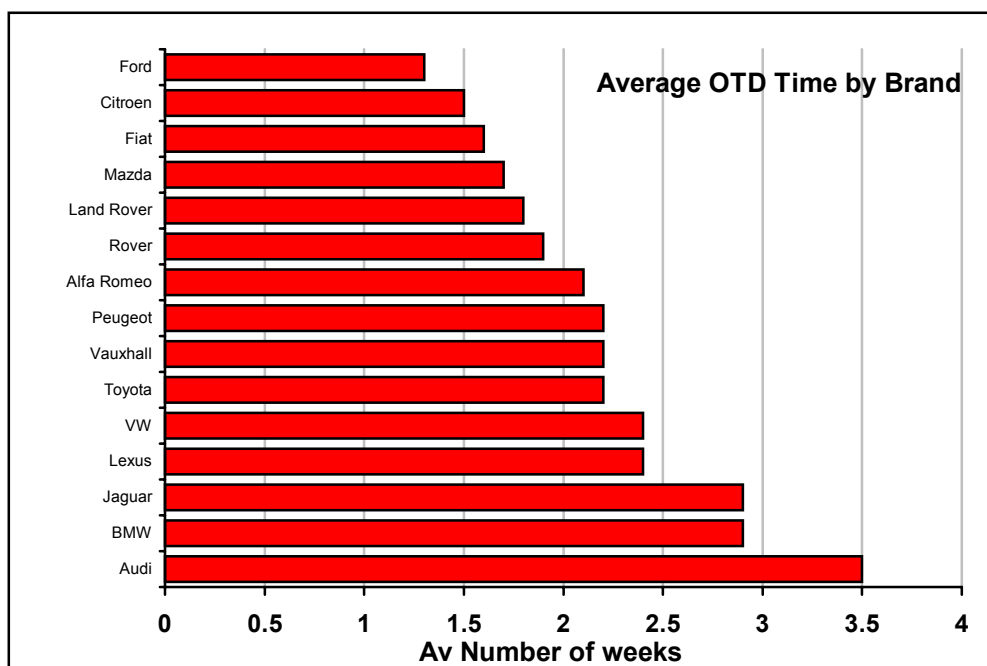
The age of the car buyer appears to be significant in his or her expectation of the ideal OTD time, with **84% of under 25's** saying that the OTD should be 2 weeks or less, compared with **54% of 26 -35** year olds, **62% for 36 - 55** and **58% for over 55's**.

This tendency is reinforced by the average OTD ideal wait time for each age group:

<25 yrs	10.5 days	36-55	20.1 days
25-35	19.7 days	>55:	18.6 days

Brand & OTD Ideal Time

The chart below details the average ideal OTD time for each brand surveyed. So, the average **Ford** new car buyer thinks that their new car should be delivered to them in less than **1½ weeks**, while at the other end of the scale, the average **Audi** buyer thinks the ideal delivery time is **3½ weeks**.



As can be seen in the chart above, buyers of volume cars tend to want a shorter OTD time than buyers of specialist cars, who generally are prepared to wait longer, (though Alfa Romeo and Volkswagen buyers are notable exceptions to this rule).

Comment

Buyers appear to believe there is a relationship between quality and time – in other words, a quality or specialist car will take longer to make and deliver than a volume car (a notion that is backed up in the 3DayCar consumer qualitative research). Such notions are probably based on longstanding beliefs on "craftsmanship", and of course, it is true for many consumer products and especially services.

It could be argued that manufacturers have exploited these beliefs, and have even made a virtue of 'having to wait' – suggesting exclusivity, and the attraction of a product in high demand. This highlights possible challenges when marketing the 3Daycar: there will be a need to develop the belief that a new car buyer can have the car of his or her choice within a short lead time without incurring premium costs and without any loss of quality – indeed, the costs may even be less. Overall, a potentially counter-intuitive proposition.

It is interesting how expectations vary across the brands, and while generally there is a volume-specialist divide, there may also be some 'conditioning' of expectations taking place. For example, Ford buyers have the shortest lead time expectations, and this could be based on previous Ford buying experiences (they are used to getting a car quickly from stock), or the approaches and attitudes of dealer sales staff that translate into buyer perceptions. An alternative hypothesis is that the Ford brand actually attracts impatient consumers (for example, younger motorists) – which could have interesting implications on the adoption of 3DayCar for Ford.

Younger buyers are particularly demanding in their short delivery time expectations, and the 84% with an ideal OTD of 2 weeks is significantly higher than older age groups. This may, of course be down due to a degree of 'youthful impatience', which may diminish with age. However, it could equally be argued that this group is in the vanguard of the instantly gratified consumer, whose expectations are significantly different from their elders, and provide an insight on the direction of buyer behaviour development over the next decade.

Finally, it is worth comparing buyers' views with those of dealers. Previous research asked dealers how long they thought customers were prepared to wait for cars. This revealed that dealers thought that x% would wait x days, ...

4 Conclusions

With over 1,000 new car buyers surveyed, representing 71% of the 2000 new car market, (in terms of brands covered) the results can be considered robust and a good indicator of *private* new car buyer behaviour.

In terms of information sources used by the new car buyer, the results indicate that the dealer still has an important role in supplying facts and figures to the public. Friends and Relatives are also relied upon for advice, especially by younger buyers. While in absolute terms the Internet has a minor role, this is clearly a dynamic situation, and the almost 20% who claim to have used it as an information source has probably grown quickly from a low base, and may increase significantly in the future, as household Internet penetration grows (estimated to be c 40% in the UK 2001) – and especially as it was used particularly more by younger car buyers.

The results indicate that there is a surprisingly short time spent on making the purchase decision for volume cars, with 46% of buyers taking less than 2 weeks from their initial decision to buy to placing an order, while the comparative figure for specialist buyers is half that at 23%. One could surmise that a more expensive purchase involves greater search, more consideration over choice of options, and possibly more complex financing arrangements – so the whole process is elongated. Overall, however, the results are consistent with the notion of consumers move quickly to the choice, which they want gratified as soon as possible.

The current system manages to provide a new car within 1 month to around three quarters of all buyers, with nearly 40% getting their car in less than 2 weeks. Buyers of specialist cars wait longer than buyers of volume cars (6 weeks v 4½ weeks).

Waiting time is important to choice of car, with around two thirds of respondents saying it was important to some extent. Younger buyers have a particularly propensity to state this.

The present system is an “almost 2 week car system” for around 40%, while nearly 80% get their vehicle within a month. However, the rapid delivery figure is largely achieved through stock purchases.

Almost a quarter of all buyers accept an alternative model to that they initially wanted, indicating that the need to have a new car quickly outweighs other preferences. In total, around one eighth said they received some material benefit as compensation for their compromise, which it could be argued manifest themselves as increased costs, lost margins or reduced profitability

A strong theme running through the results is the difference in attitudes and behaviour of younger new car buyers, who consistently have significant differences in behaviour and expectations. They use information technology more, are generally less patient and the consumer group most likely to demand ‘instant gratification’ from suppliers. They are the ‘natural’ 3DayCar consumers, who will arguably take these buying characteristics with them as they age. The implication for the market as a whole is a gradual shift towards consumers who will be receptive to the 3DayCar offer.

Differences between specialist and volume buyers is another important theme in the analysis, with specialist buyers being prepared to wait longer for their vehicles a particular factor. After all, it is a more considered purchase, and there is an apparent relationship between *quality* and *time*, which suggests that consumers actually expect higher cost (and quality) cars to take longer to build and deliver (this was highlighted in 3DayCar consumer group discussion research). The technical reality is that there is no discernible difference between the two types of vehicle, though it appears that new car marketing actually exploits this belief. This may be material in the marketing and communication of the 3dayCar concept to specialist buyers, who will – in effect – be asked to discount their traditional beliefs about time and quality. The proposition of “high(er) quality – low(er) cost – short(er) lead time” will appear counter intuitive to some.

Overall, this research suggest that OTD time does matter to consumers, and that their ideal time is much less than certain section of the industry thinks. The implication is that consumer demand for a 3DayCar (ie one build to order and delivered in a short delivery time of the buyers choosing) would be strong, and that there is a latent potential ready to be exploited.

Appendix I - Questionnaire

Q 1 a. What new car did you buy (make & model)? _____

b. Month/year of purchase _____ c. Did you trade-in a car? yes no

Q 2 Which of the following information sources did you use to find out about the car you bought and others considered?

Tick as many as appropriate & then rank the three most important sources (1 = most important).

Information source	tick if used	rank the 3 most important to you
Car magazines	<input type="checkbox"/>	
TV programmes	<input type="checkbox"/>	
Friends, relatives, colleagues	<input type="checkbox"/>	
Manufacturer/dealer brochures	<input type="checkbox"/>	
Newspaper articles	<input type="checkbox"/>	
Internet / world wide web	<input type="checkbox"/>	
Dealer sales staff	<input type="checkbox"/>	
Consumer Association (<i>Which?</i>)	<input type="checkbox"/>	
Motor shows, exhibitions	<input type="checkbox"/>	
TV advertising	<input type="checkbox"/>	

Q 3 What was the length of time from your initial decision to buy a new car, to the time of placing your order with the dealer?

less than 2 weeks 2 weeks to 1 month 1 month to 3 months more than 3 months

Q 4 How important to your final purchase choice was the time you would have to wait for your new car to be delivered ?

very important quite important not very important not at all important

Q 5 What was the length of time from placing your order to taking delivery of your car?

less than 2 weeks 2 weeks to 1 month 1 month to 3 months more than 3 months

Q 6 When buying your car, did you accept an alternative specification to the one you initially had in mind? (for example, because your preference was not available, would take too long to arrive, or because you were offered an alternative model in stock)

Tick either 'yes' or 'no' below.

no - go to question 8 yes *if yes, indicate below how the alternative specification differed from your initial choice and how these changes mattered*

Alternative specification	yes	mattered a lot	mattered slightly	did not really matter
colour or paint type	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
engine size/type	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
interior options (eg seat material)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
body shape (eg hatchback, saloon)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
exterior options (eg alloy wheels)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q 7 Did you receive any benefits for taking an alternative specification to your preferred choice?

no yes - *if yes, indicate specific benefits below*

Benefit received	yes
discount off new car price	<input type="checkbox"/>
specification upgrade	<input type="checkbox"/>
better price on trade-in	<input type="checkbox"/>

Other benefits:

good finance deal	<input type="checkbox"/>
after sales offer (eg servicing)	<input type="checkbox"/>

Q 8 What day of the week and in what period of the day did you order your car from the dealer?
Tick one box for the day of the week, and one box for the period of day

	day	morning	lunchtime	afternoon	evening
Monday	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tuesday	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wednesday	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Thursday	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Friday	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Saturday	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sunday	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q 9 How did you confirm your final order with the dealer?

in person by phone by fax post

Q 10 What day of the week and in what period of the day did you take delivery of your car?
Tick one box for the day of the week, and one box for the period of day

	day	morning	lunchtime	afternoon	evening
Monday	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tuesday	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wednesday	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Thursday	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Friday	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Saturday	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sunday	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q 11 Approximately how many times did you visit or contact the dealership from where you bought your car during the whole buying process? (including test drives, negotiation, sorting paperwork, picking up information, finding out dates, etc)

under 3 times 3 - 5 times 5 to 7 times more than 7 times

Q 12 Ideally, when buying a new car of your choice, how long do you think it should take for it to be delivered to you after placing the order at the dealer?

up to 1 week 1 -2 weeks 2 -3 weeks 3 - 4 weeks 4 - 6 weeks

Q 13 Finally, please provide the following information about yourself

Sex: male female **Age:** under 25 25-35 36-55 over 55

Cars in household: 1 2 3 or more

Is your new car privately owned, or a company car, or owned by a small business

In which region do you live? London/S East Midlands S West E Anglia North

N East N West South Wales Scotland

If you wish to be entered in the prize draw, write your name and address here:

If you would be willing to take part in a short telephone discussion about new car buying with one of our researchers, please tick here

yes

Telephone number: _____

*Thank you very much for your assistance.
Please return as soon as possible in the Freepost envelope.*

Appendix II – Questionnaire Covering Letter

[Dealership name
address]

[New car buyer
address]

4th October 2000

Dear [recent new car buyer]

Re: New Car Buyers Questionnaire

Researchers at Cardiff Business School undertaking a survey of the car market, have asked us if we would contact some of our recent customers and invite them to complete a short questionnaire on their buying experiences. The Business School, which is well known for its research into the car industry, is involved in a study that is examining the way new cars are ordered, built and delivered to customers. The research, which is part-funded by the Government, ultimately aims to recommend improvements to the overall system that will benefit dealers, car manufacturers and customers alike.

You have been selected to receive the questionnaire as you have recently purchased a new car, and so are in a unique position to provide up-to-date and relevant information. Your assistance in completing the attached questionnaire would be greatly appreciated.

The questionnaire should only take a few minutes to complete, and asks some questions on the steps you took when buying, the choices and decisions made, sources of information used, and the timing of the key stages involved. Don't worry if you cannot give precise or exactly factual answers - your best estimate is sufficient. Naturally, all replies will be treated in the strictest confidence, and no individual names will be revealed in the results.

Once completed, please return the questionnaire in the pre-paid envelope. **All completed questionnaires returned will be entered in a prize draw, with the first ten drawn receiving a £10 Marks & Spencer gift voucher (draw will take place on 30th November 2000).**

If you have any queries about the questionnaire, feel free to contact Simon Elias at Cardiff University on (029) 2087 5080. Thank you for your co-operation.

Yours sincerely

[Manager The Dealership]