

2018 Automotive Fuel Economy Survey Report

The Consumer Reports Survey Team conducted a nationally representative survey in May 2018 to assess American adults' attitudes and viewpoints on vehicle fuel economy.

HIGHLIGHTS

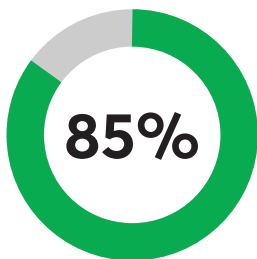
JULY 2018

- Nearly **40%** (38% to be exact) of American car owners identify **fuel economy** as a top aspect of their current vehicle that has the most room for improvement. In fact, it is the most commonly chosen attribute, clearly topping the 2nd most selected attributes of purchase price and maintenance costs (endorsed by 22% of American drivers, respectively).
- Drivers of larger vehicles are at least **two times as likely** as drivers of small and midsize cars to select fuel economy as an improvement-attribute.

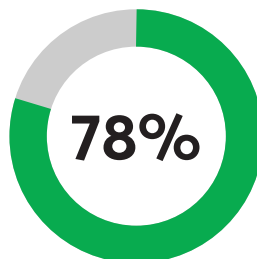
Most (85%) American adults (regardless of whether or not they're a licensed driver who owns a vehicle) agree that automakers should continue to improve fuel economy for all vehicle types. However, fewer than **half (43%)** think that automakers are doing a good job at actually making fuel-efficient passenger vehicles.

OPINIONS ON FUEL EFFICIENCY STANDARDS

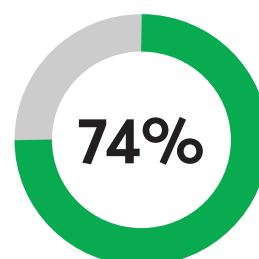
The American public expresses overwhelming majority support for the goal of national fuel efficiency standards.



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."



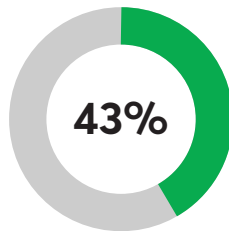
of Americans **agree** that "Increasing average fuel economy from 25 miles per gallon (mpg) today to 40 MPG by 2025 is a worthwhile goal."

Support cuts across party lines:

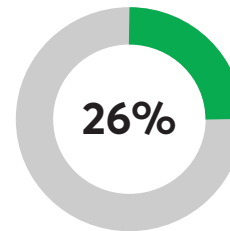
Support for better fuel economy cuts across party lines, with Republicans slightly more likely than Democrats to express support for better fuel economy in two of three cases, especially for larger vehicles.

Statement	Overall agree	Republicans agree	Democrats agree
Automakers should continue to improve fuel economy for all vehicle types	85%	88%	84%
Making larger vehicles such as SUVs or trucks more fuel-efficient is important	78%	83%	76%
Increasing average fuel economy from 25 miles per gallon (mpg) today to 40 MPG by 2025 is a worthwhile goal.	74%	73%	76%

At the same time, many consumers are skeptical of the commitment of auto manufacturers to meet these goals:



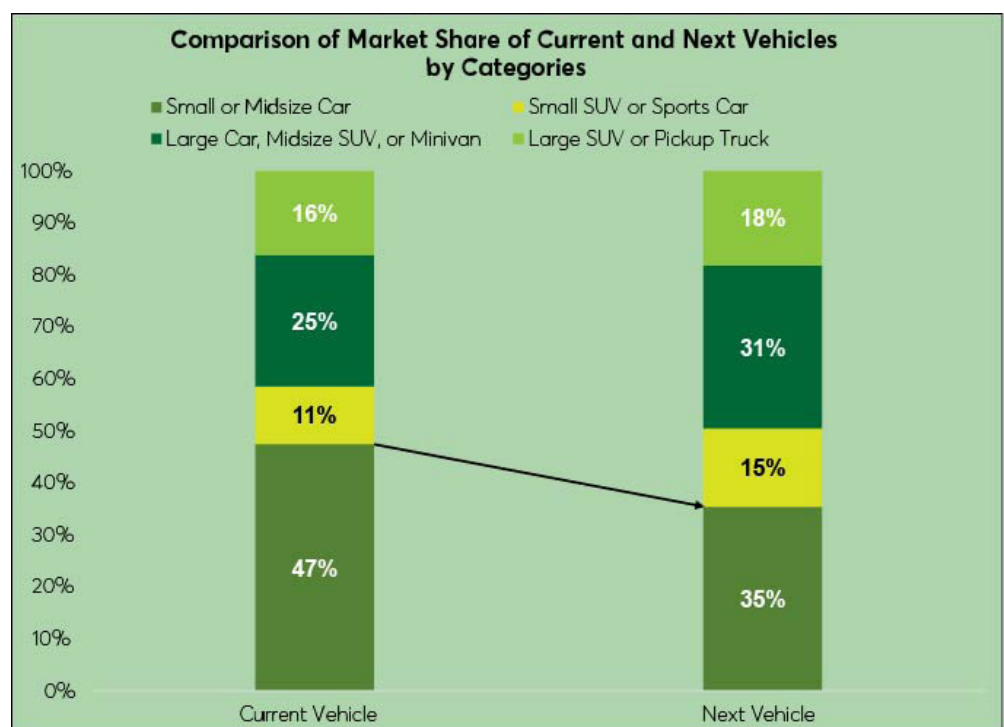
of Americans **agree** that "Automakers are doing a good job or making fuel-efficient passenger vehicles"



of Americans **agree** that "Automakers care about lowering fuel costs for their customers"

THE NEXT VEHICLE AMERICANS PLAN TO BUY

Based on the types of cars Americans currently own vs. the types they're likely to purchase for their next cars, our survey results indicate that consumers plan to continue the shift toward larger vehicles.

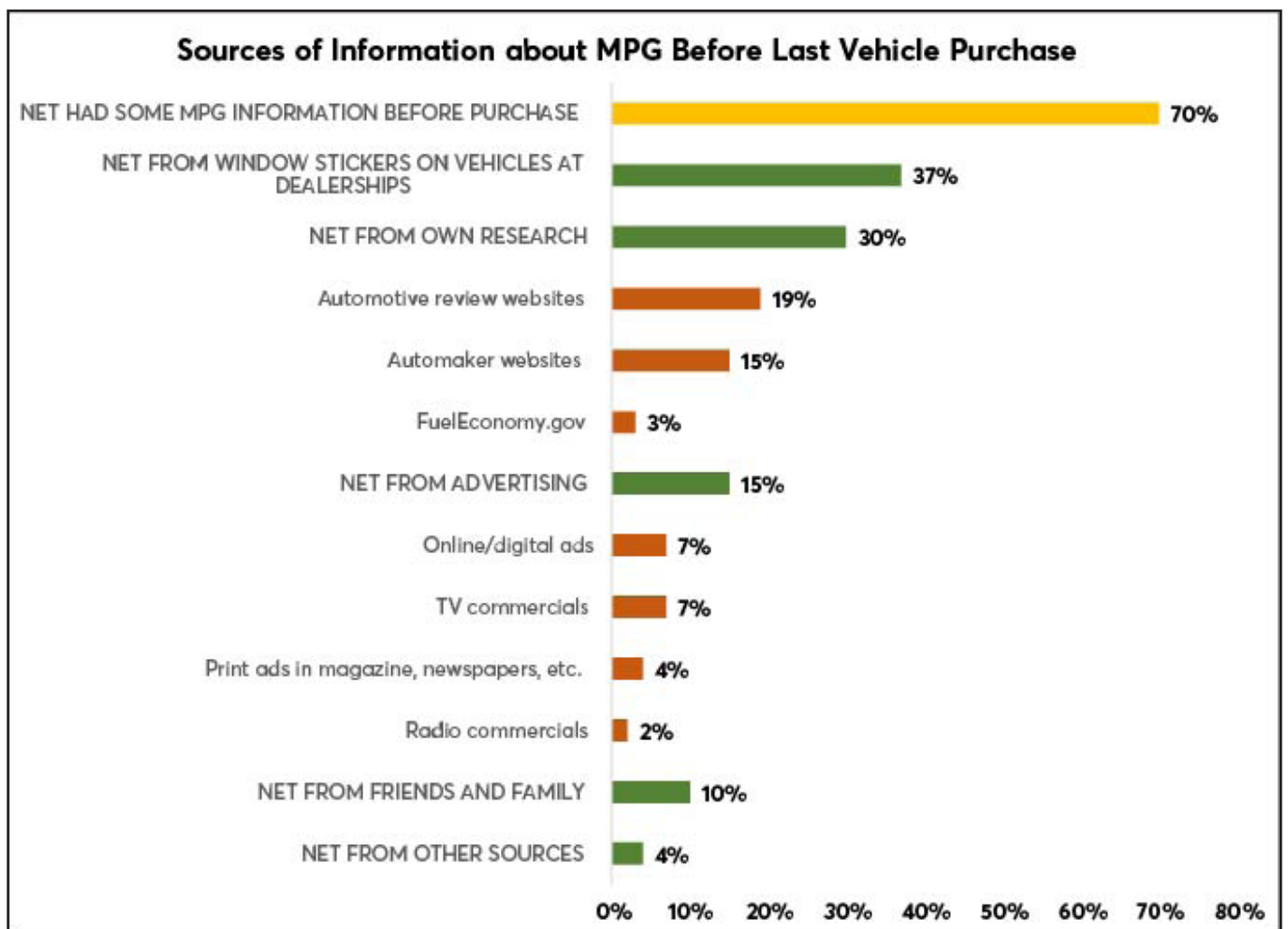


SOURCES OF MPG INFORMATION

Although most vehicle owners had some MPG information on hand when they bought their current car, **that information was not very robust.**

Nearly **one-third (30%)** of vehicle owners said they hadn't obtained any information about their current car's MPG before purchasing or leasing it.

Among vehicle owners who had any knowledge of their current car's MPG before buying it, the most common source for finding out about fuel economy was from the **window sticker at the dealership (37%)**. In fact, the window sticker was the only source of MPG information for **23%** of all current vehicle owners.



AREAS FOR IMPROVEMENT

As was the case in our 2017 survey, **fuel economy** remains the most frequently selected factor when asking licensed car owners about the attributes of their current vehicle most in need of improvement.

Thirty-eight percent chose it. Purchase price (22%), maintenance costs (22%) and infotainment or connectivity (21%) clustered closely as the second tier of attributes warranting improvement.

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 %	Democrat %
<i>Respondents selected UP to three responses.</i>										
Fuel economy	38%	35%	38%	41%	35%	40%	38%	39%	39%	36%
Purchase price	22%	21%	23%	23%	28%	23%	20%	20%	24%	22%
Maintenance costs	22%	26%	21%	19%	26%	22%	22%	21%	19%	23%
Infotainment or connectivity	21%	18%	20%	27%	22%	18%	21%	24%	21%	24%
Passenger room	14%	14%	16%	13%	13%	15%	13%	12%	16%	12%
Vehicle comfort	12%	11%	12%	12%	9%	14%	12%	12%	13%	11%
Cargo space	11%	11%	10%	11%	10%	10%	12%	9%	12%	9%
Safety	10%	12%	9%	7%	10%	8%	9%	12%	9%	11%
Horsepower	9%	7%	10%	9%	6%	8%	10%	10%	8%	10%
Reliability	8%	14%	7%	4%	6%	10%	9%	7%	9%	8%
Vehicle size	8%	9%	7%	8%	9%	8%	8%	8%	7%	9%
Off-road capability	8%	8%	7%	10%	10%	6%	9%	8%	11%	7%
Style	6%	5%	8%	5%	6%	8%	5%	6%	6%	6%
Handling	5%	3%	3%	8%	4%	4%	5%	6%	5%	5%

Other noteworthy observations from the above table include the following:

Fuel economy ranks first among the attributes requiring improvement **across each of the three income groups**, each of the four regions, and among both Republicans and Democrats.

Republicans (39%) are **slightly more likely** than Democrats (36%) to mention fuel economy as an automotive attribute most in need of improvement.

Thinking about your current vehicle, which three attributes have the most room for improvement?	Total	Current Car MPG			Current Car Type				Fuel Standards	
		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	Weak	Moderate or Strong
	%	%	%	%	%	%	%	%	%	%
<i>Respondents selected UP to three responses.</i>										
Fuel economy	38%	57%	36%	21%	56%	50%	39%	25%	31%	39%
Purchase price	22%	20%	24%	23%	23%	25%	18%	21%	17%	23%
Maintenance costs	22%	24%	24%	18%	23%	21%	21%	23%	21%	23%
Infotainment or connectivity	21%	20%	24%	19%	15%	24%	20%	23%	20%	22%
Passenger room	14%	12%	16%	14%	16%	13%	20%	13%	13%	15%
Vehicle comfort	12%	11%	11%	14%	8%	11%	12%	14%	12%	12%
Cargo space	11%	11%	10%	12%	8%	8%	18%	11%	9%	11%
Safety	10%	9%	8%	13%	9%	8%	7%	11%	11%	9%
Horsepower	9%	7%	8%	12%	6%	4%	18%	10%	8%	9%
Reliability	8%	11%	7%	7%	7%	9%	12%	8%	8%	8%
Vehicle size	8%	6%	9%	10%	7%	6%	9%	10%	10%	8%
Off-road capability	8%	6%	9%	10%	5%	5%	6%	12%	5%	9%
Style	6%	5%	6%	7%	4%	8%	3%	7%	6%	6%
Handling	5%	5%	4%	6%	7%	3%	5%	5%	5%	5%

Vehicle owners driving cars with poor gas mileage and those driving larger vehicles are **significantly more likely** to have selected fuel economy as an area for improvement than are other drivers.

Drivers of cars averaging less than 20 MPG are almost **three times more likely** than drivers of cars averaging 30 MPG or more to select fuel economy as an attribute most in need of improvement.

Drivers of larger vehicles are at least **two times** as likely as drivers of small and midsize cars to select fuel economy as an improvement-attribute.

METHODOLOGY

This survey was administered online from May 16 to May 30, 2018, to a nationally representative sample of 1,200 U.S. residents, 18 years of age and older, who are members of GfK's KnowledgePanel. The 1,094 respondents who screened in to the main survey are the respondents who are currently licensed drivers and own a vehicle. KnowledgePanel members are randomly recruited through probability-based sampling to be representative of the U.S. population. 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 for the sample of 1,200 U.S. residents is approximately +/- 3% at the 95% confidence level.