
After a month of diesel scandal, is diesel making upturn from the bottom?

☒ Major findings

"Perception on Diesel engine is recovering from the bottom"

"Still cold-hearted about the diesel from VW Group and Europe"

"Japanese and American cars led the relieving of overall negative perception on imported cars"

"44% of imported car purchase intenders postponed purchase timing"

- **In diesel-related issues, the view to regard it as the matter of VW group and further of all European cars is still dominant.**

- The view to regard domestic, Japanese and US diesel cars having the same problem has gradually decreased (Table 1).
- Purchase intention that had converged to domestic car fell after mid-October.
- Japanese and American cars led the recovery of Purchase intention for imported cars [Table 3]

- **Purchase intention for imported cars is in recovering trend but the actual purchase is after observing a little more.**

- 44% of imported car purchase intenders (31% of domestic) postponed purchase timing [Table 5]
- Poor sales of imports appears to be continued for a while

- **Purchase intention for hybrid & gasoline turned into declining, while the weak diesel is in recovering trend.**

- Purchase intention change for hybrid & gasoline has decreased, while diesel rebounded from the bottom [Table 2]

- **Emotional response for premium brands (Benz, BMW) had relative less impact, while Imported Mass Brands and domestic had a large impact.**

- Japanese Mass Brands has risen after a declining
- Hyundai, Renault Samsung & Ssangyong fell after rising [Table 6]

"Exigent consumer study", which has been ongoing for a total of six times weekly from immediately after the VW diesel scandal that occurred on September 22, is wrapping up.

We thank all the people who expressed their interest during the past six weeks, and promise to continue the role as Insight Provider even after this event.

For more Information

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[Tab. 1] Diesel engine scandal related attitude

↑/↓ : Increase/Decrease by 3%p or over from the previous wave

		1st (9.24)	2nd (9.29)	3rd (10.8)	4th (10.15)	5th (10.15)	6th (10.28)
Knew emission gas issue?	Knew	93%	96%	98%	97%	97%	98%
Responsible body?	VW only	10%	7% ↓	6%	6%	7%	7%
	All VW group	38	34 ↓	34	37 ↑	37	35
	All German cars	10	12	11	10	11	9
	All European cars	42	48 ↑	50	47 ↓	45	49 ↑
Total		100%	100%	100%	100%	100%	100%
How about domestic Diesel?	Should have problem	80	80	74 ↓	70 ↓	69	68
* How about Japanese Diesel?	Should have problem	-	-	74	67	61 ↓	62
* How about US Diesel?	Should have problem	-	-	68	64 ↓	61 ↓	60

Q. Have you heard of recent pollutant emission gas manipulation on diesel vehicles by Volkswagen?

Q. How do you feel about the pollutant emission gas manipulation on diesel vehicles by Volkswagen?

Q. And then, do you expect domestic/Japanese/American/European (Non-German)/German diesel cars also having same problem?

* Question for Japanese/American diesel cars are included from 3rd wave.

[Tab. 2] Purchase intention change by fuel type

↑/↓ : Increase/Decrease by 3%p or over from the previous wave

	Positive %						Positive % - Negative %					
	1st (9.24)	2nd (9.29)	3rd (10.8)	4th (10.15)	5th (10.21)	6th (10.28)	1st (9.24)	2nd (9.29)	3rd (10.8)	4th (10.15)	5th (10.21)	6th (10.28)
Gasoline	34 %	37 % ↑	36 %	34 %	31 % ↓	31%	26 %p	28%p	30%p	30%p	25%p ↓	26%p
Diesel	6	5	5	5	3	4	-36	-44 ↓	-42	-40	-44	-38 ↑
Hybrid (Including PI)	38	46 ↑	49	48	49	44 ↓	27	38 ↑	43 ↑	42	42	37 ↓
Electric	31	35 ↑	35	37	38	36	18	25 ↑	26	27	31 ↑	28 ↓
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Q. And then, which fuel type will you select when you purchase next car? (Answers : Became larger, No change, Became smaller)

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[Tab. 3] Purchase intention change by origin

↑/↓ : Increase/Decrease by 3%p or over from the previous wave

	Positive %						Positive % - Negative %					
	1st (9.24)	2nd (9.29)	3rd (10.8)	4th (10.15)	5th (10.21)	6th (10.28)	1st (9.24)	2nd (9.29)	3rd (10.8)	4th (10.15)	5th (10.21)	6th (10.28)
Domestic cars	35%	37%	32% ↓	39% ↑	33% ↓	32	22%p	26%p ↑	20%p ↓	29%p ↑	22%p ↓	22%p
Japanese cars	13	14	11 ↓	9	11	13	-23	-21	-25 ↓	-32 ↓	-24 ↑	-17 ↑
European cars (Except German)	6	9 ↑	4 ↓	5	5	5	-35	-34	-38 ↓	-38	-37	-33 ↑
German cars	4	4	2	3	3	2	-49	-55 ↓	-54	-51 ↑	-52	-48 ↑
American cars*	-	-	9	9	9	9	-	-	-21	-25 ↓	-23	-17 ↑

Q. Is there any change in your thought for the purchase of which country of origin car, because of this event?

(Answers : Became larger, No change, Became smaller)

*American cars included from 3rd study

[Tab. 4] Change in Purchase intended fuel type

↑/↓ : Increase/Decrease by 3%p or over from the previous wave

	Syndicated Study* (15. 7)	1st (9.24)	2nd (9.29)	3rd (10.8)	4th (10.15)	5th (10.21)	6th (10.28)
Gasoline	41%	40%	35% ↓	36%	34%	34%	33%
Diesel	43	21 ↓	19	21	21	19	24
Hybrid (Including PI)	11	29 ↑	35 ↑	33	34	36	34
LPG	5	6	6	5	6	6	5
Electric	1	5	6	5	5	5	5
Total	100%	100%	100%	100%	100%	100%	100%

Q. And then, which fuel type will you select when you purchase next car?

➔ Answers of entire purchase intenders within 2 years (N=31,809) were gasoline (41%), diesel (43%), hybrid-including PI (11%), LPG (5%)

[Tab. 5] Changes in purchase intended timing (6th survey : Oct. 28 2015)

	Total	Domestic purchase intenders	Imports purchase intenders
No change (As scheduled)	63%	67%	55%
Will delay the purchase timing	35	31	44
Will advance the purchase timing	2	2	1
Total	100%	100%	100%

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[Tab. 6] Emotional response for brand

↑/↓ : Increase/Decrease by 3%p or over from the previous wave

(Positive response rate, %)	3 rd (10.08)	4 th (10.15)	5 th (10.21)	6 th (10.28)
*D. BENZ	56%	54%	60% ↑	57% ↓
*D. BMW	51	52	55 ↑	56
*K. HMC	46	52 ↑	49 ↓	48
LAND ROVER	45	45	47	46
*K. KMC	41	45 ↑	42 ↓	46 ↑
*K. RSM	35	40 ↑	41	44
*D. AUDI	41	40	42	42
VOLVO	39	39	39	40
Jeep	37	39	40	39
*K. GMK	36	38	38	39
*J. LEXUS	40	35 ↓	40 ↑	37 ↓
*K. SYM	28	31 ↑	29	36 ↑
FORD	27	30 ↑	29	33
*J. INFINITI	33	29 ↓	33 ↑	30 ↑
*J. TOYOTA	34	28 ↓	32 ↑	29
PEUJOT	23	25	24	27
*J. HONDA	26	23 ↓	27 ↑	27
*J. NISSAN	25	23	25	24
*D. VW	21	19	21	23

Q. How positive or negative are you for following automobile brands?

*K (domestic), D (German), J (Japanese)

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[Tab. 7] Emotional response by Origin × fuel type

↑/↓ : Increase/Decrease by 3% or over from the previous wave

(Positive response rate, %)		3 rd (10.08)	4 th (10.15)	5 th (10.21)	6 th (10.28)
Gasoline car	Korea	42%	46% ↑	46%	44 %
	Japan	31	28 ↓	33 ↑	33
	US	28	28	28	29
	Europe	33	32	33	32
	Germany	35	33	38 ↑	36
Diesel car	Korea	32	38 ↑	37	35
	Japan	20	20	21	23
	US	21	22	24	22
	Europe	26	28	28	29
	Germany	24	25	28 ↑	29
Electric car	Korea	34	38 ↑	47 ↑	33 ↓
	Japan	33	31	44 ↑	34
	US	34	34	34	33 ↓
	Europe	31	32	35 ↑	30 ↓
	Germany	29	31	33	31
Hybrid car	Korea	44	47 ↑	38 ↓	41 ↓
	Japan	41	38 ↓	34 ↓	43
	US	31	34 ↑	37 ↑	31 ↓
	Europe	34	34	34	33
	Germany	32	30	32	33

Q. How positive or negative are you for following 'country' and 'fuel type'?

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☒ Reference: Study outline

I. Progress

- 2015 . 09. 22 Spreading of public opinion after admitting VW EA189 engine related problem
- 2015. 09. 24 1st Diesel issue exigent consumer study
- 2015 . 09. 29 2nd Diesel issue exigent consumer study
- 2015. 10 .08 3rd Diesel issue exigent consumer study
(☞ Added emotional response survey question)
- 2015. 10 .15 4th Diesel issue exigent consumer study
- 2015. 10 .21 5th Diesel issue exigent consumer study
- 2015. 10. 28 6th Diesel issue exigent consumer study (Final)

II. Study design

- **Sampling frame:** Annual Automobile Syndicated Study respondents conducted in Jul. 2015 by Consumer Insight
- **Target sample:** New car purchase intenders within 2 years among Syndicated Study respondents (31,809 persons)
- **Number of samples :** Around 1,200 persons in each wave (Total 6,994 persons for 6 waves)

III. Major study contents

- | | |
|---|---|
| • Exigent consumer study | <ul style="list-style-type: none">- Diesel engine scandal awareness- Range of responsible automakers- Change in purchase intention by country of origin- Change in purchase intended fuel type |
| • Emotional response study
(Added from 3 rd study) | <ul style="list-style-type: none">- Emotional response on auto manufacturing country- Emotional response by vehicle brand
(5 domestic, 14 imported brands)- Emotional response by Country × Fuel type |

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