

Report Price: £1095.00 | \$1478.58 | €1232.31

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"Despite low levels of ownership in 2017, sales of Alternative-fuel Vehicles (AFVs) such as hybrids or electric cars continue to see year-on-year increases as Irish consumers become increasingly concerned with maximising fuel efficiency and minimising car running

- Brian O'Connor, Senior Consumer Analyst

This report looks at the following areas:

Car registration levels in both NI and RoI declined when comparing 2016 and 2017 as consumers became somewhat more cautious with their spending, but within the sector registrations of electric and hybrid cards saw strong improvements (albeit from a low base) highlighting the changing attitudes towards the environment and fuel usage among Irish consumers.

BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533

> Brazil 0800 095 9094

Americas +1 (312) 943 5250

+86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market



Report Price: £1095.00 | \$1478.58 | €1232.31

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

What you need to know

Issues covered in this Report

Executive Summary

The market

Figure 1: Total new car registrations, NI and RoI, 2013-18

Forecast

Figure 2: Indexed new car registrations, NI and RoI, 2013-23

Market factors

Fuel prices increase on the back of crude oil improvement

Dealerships key channel for car financing

Personal finances expected to remain stable

Innovations

The consumer

Three quarters own a car

Figure 3: Ownership of a car, NI and RoI, 2016 and 2018

Figure 4: When consumers bought their car, and if it was new or second-hand, NI and RoI, January 2018

Figure 5: Reasons why consumers do not currently personally own a car, NI and RoI, January 2018

Petrol and diesel key choices for future car purchase

Figure 6: Desired fuel type for future car purchase, NI and RoI, January 2018

Smartphones use while driving a worry for four in five

Figure 7: Agreement with statements relating to cars, NI and RoI, January 2018

The Market - What You Need to Know

New car registrations fall in 2017

Crude oil value shifts petrol and diesel prices

Car tax increasingly linked to emissions

Dealerships key channel for car financing

Consumers somewhat optimistic about their finances, less so about the economy

Market Size and Segmentation

New car registrations expected to hit five-year low in NI in 2018

Figure 8: Total new car registrations, IoI, NI and RoI, 2013-23

Figure 9: Number of used imported cars registered, RoI, 2013-18

Electric/ Hybrid cars see huge year-on-year increase

Figure 10: New car registrations, by engine type, RoI, 2013-17

UK/NI sees increase in alternative-fuel cars too

Figure 11: Sales of new cars, by fuel type, UK (inc NI), 2013-17

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 | **EMAIL:** reports@mintel.com



Report Price: £1095.00 | \$1478.58 | €1232.31

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Volkswagen top seller of 2017 in RoI, Ford for UK

Figure 12: New car registrations, by top 10 brands of cars, RoI, 2013-17

Figure 13: Manufacturer shares of new car registrations, 2013-17

Market Drivers

Crude oil continues to regain value

Figure 14: Annualised Brent crude oil price per barrel, global, 2013-18

Petrol and diesel costs continue to increase

Figure 15: Indexed consumer prices for petrol and diesel, RoI, January 2015-February 2018

Figure 16: Indexed consumer prices for petrol and diesel, UK/NI, January 2015-February 2018

New road tax bands introduced for UK/NI

Figure 17: Vehicle Excise Duty Rates, April 2017

Figure 18: Vehicle Registration Tax, RoI, 2018

EU ruling could help boost more NI to RoI car imports

Dealerships key channel for car financing

Figure 19: Main reasons for saving by consumers, NI and RoI, October 2017

Figure 20: Main reason for taking out most recent loan, RoI and NI, November 2017

Figure 21: Car finance providers used, UK, February 2017

Improvement in outlook for personal finances

Figure 22: If consumers expect their personal financial situation to change in the next 12 months, NI and RoI, April 2017-March 2018

NI consumers pessimistic about the economy, RoI consumers confident

Figure 23: If consumers expect the general economic situation of NI/RoI to change in the next 12 months, NI and RoI, April 2017-March 2018

Companies and Brands - What You Need to Know

Scrappage scheme offered by major operators and the impact on green vehicle sales

SIMI sales figures

New models from Mercedes and Volkswagen released to Irish market

Donnelly Group goes 'carbon-neutral'

Who's Innovating?

Role of physical car dealership being challenged by the internet

AutoGravity aiming to streamline the car financing process

Convergence of Autonomous and Electric Vehicles could make car ownership a hobby rather than a necessity

Companies and Brands

Agnew Group

Key Facts

Recent Developments

BMW Group Ireland

Key Facts

Recent Developments

Ford Ireland

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com



Report Price: £1095.00 | \$1478.58 | €1232.31

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Key Facts

Recent Developments

Mercedes-Benz Ireland

Key Facts

Recent Developments

Nissan Ireland

Key Facts

Recent Developments

Peugeot Ireland

Key Facts

Recent Developments

Renault Ireland

Key Facts

Recent Developments

Volkswagen Ireland

Key Facts

Recent Developments

Audi Ireland

Key Facts

Recent Developments

Charles Hurst

Key Facts

Recent Developments

Donnelly Group

Key Facts

Recent Developments

MSL (Motor Service Limited) Group

Key Facts

Recent Developments

Tesla

Key Facts

Recent Developments

Toyota Ireland

Key Facts

Recent Developments

Opel-Vauxhall

Key Facts

Recent Developments

The Consumer - What You Need to Know

BUY THIS REPORT NOW **VISIT:** store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com



Report Price: £1095.00 | \$1478.58 | €1232.31

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Three quarters of consumers personally own a car

Diesel and petrol still key engine types for future purchases

Safety on the minds of Irish motorists

Car Ownership and When Last Car was Purchased

Car ownership remains stable in 2018

Figure 24: Ownership of a car, NI and RoI, 2016 and 2018

Figure 25: Ownership of a car, by gender, NI and RoI, January 2018

Ownership levels remain higher among mature consumers

Figure 26: Ownership of a car, by age and social class, NI and RoI, January 2018

A third of RoI drivers have bought second-hand two or more years ago

Figure 27: When consumers bought their car, and if it was new or second-hand, NI and RoI, January 2018

A lack of licence barrier to ownership growth

Figure 28: Reasons why consumers do not currently personally own a car, NI and RoI, January 2018

Figure 29: Consumers who do not currently have a driving licence, by gender, NI and RoI, January 2018

Figure 30: Consumers who currently have a driving licence, but do not drive, by gender, NI and RoI, January 2018

Fuel Preference for Future Car Purchase

Traditional fuels still most desired for future cars

Figure 31: Desired fuel type for future car purchase, NI and RoI, January 2018

Petrol more desirable to NI consumers due to cost, RoI consumers prefer diesel

Figure 32: Consumers who prefer petrol vs. diesel engine for future car purchase, NI and RoI, January 2018

Figure 33: Average price per litre of petrol and diesel, UK and Ireland, April 2018

Future diesel taxation/ bans could switch RoI purchasing intentions

Figure 34: Indexed new car registrations, by engine type, RoI, 2013-17

Over a quarter considering a hybrid for future purchase

Figure 35: Consumers who would prefer hybrid engine for future car purchase, by gender and age, NI and RoI, January 2018

Little immediate appetite for electric vehicles

Figure 36: Consumers who prefer Pure Electric (ie uses rechargeable batteries) vs. Plug-in Hybrid (ie combines rechargeable batteries and external power source) engine for future car purchase, NI and RoI, January 2018
Figure 37: Concerns about 100% electric vehicles, UK, September 2016

Improvements to charger network could help boost interest in electric cars

Attitudes towards Cars

Strong concern with impact of devices on driver safety

Figure 38: Agreement with statements relating to cars, NI and RoI, January 2018

Device usage key concern

Figure 39: Agreement with the statement 'I am increasingly concerned about drivers using devices while driving', by age, NI and RoI, January 2018

Safety concerns for self-driving cars need to be addressed

Figure 40: Agreement with the statement 'I would be keen to purchase a driverless car in the future', by gender, NI and RoI, January 2018

Figure 41: Agreement with the statement 'I worry that self-driving cars would be unsafe', by gender, NI and RoI, January 2018

Parents more likely to view car as a necessity



VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 | **EMAIL:** reports@mintel.com



Report Price: £1095.00 | \$1478.58 | €1232.31

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 42: Agreement with the statement 'I could not survive without my car', by presence and age of children in household, NI and RoI, January 2018

Wi-Fi desired by RoI parents to keep kids entertained

Figure 43: Agreement with the statement 'I am interested in fitting my car with in-car Wi-Fi', by presence and age of children in household, NI and RoI, January 2018

Appendix - Data Sources, Abbreviations and Supporting Information

Data sources

Generational cohort definitions

Market size rationale

Abbreviations

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 | **EMAIL:** reports@mintel.com