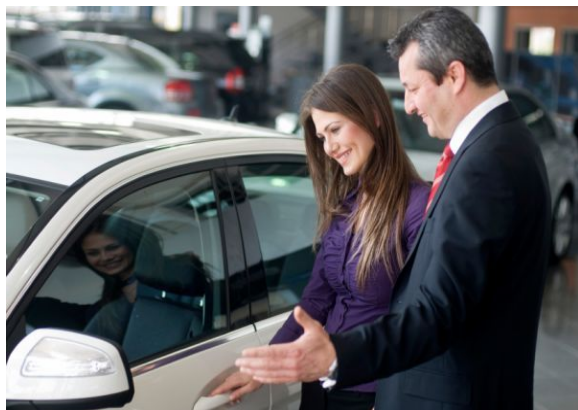


Automotive Retailing - Ireland - April 2014

Report Price: £1095.00 | \$1773.30 | €1390.99

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



“With the rising cost of learning to drive, the high motor insurance premiums for consumers aged 16-24 likely explains why they are the least likely to personally own a car. As such, new car dealerships could consider offering one year’s free insurance for consumers in this age group after a specified period of time, should they demonstrate safe driving standards and remain with their insurer.”

– James Wilson, Research Analyst

This report looks at the following areas:

- What factors do Irish consumers consider important when buying a car?
- How has the current economic outlook impacted new car registrations?
- What types of car ownership arrangements are common in Ireland?
- What do Irish consumers think about the process of buying a car?
- Are public transport and cycling schemes credible alternatives to purchasing and travelling by car?

The automotive retailing industry has been one of the sectors worst affected by the financial crisis, with new car registrations declining by 50% during the period 2007-13 despite an increase in consumer confidence during the latter part of the period.

Automotive retailers in the new car market have responded to this by introducing extended long-term warranties, high profile marketing campaigns and extending the ranges of their most popular models and brands in an effort to encourage sales.

This report examines the automotive retailing industry throughout Ireland by looking at car ownership, how much Irish consumers paid for their last car and their attitudes towards automotive retailing.

This report will examine the retailing of cars to private individuals in Ireland, and therefore excludes sales to businesses or operators of company car fleets. It is exclusively focused on cars, and therefore excludes any discussion of the market for light commercial or other goods vehicles and motorcycles.

BUY THIS
REPORT NOW

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

APAC
+61 (0) 2 8284 8100

EMAIL:
oxygen@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

Automotive Retailing - Ireland - April 2014

Report Price: £1095.00 | \$1773.30 | €1390.99

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

Table of Contents

Introduction

Key themes of the report
 Definition
 Data sources
 Abbreviations

Executive Summary

The market

Forecast

Figure 1: Indexed new car registrations, IoI, NI and RoI, 2009-19

Market factors

Irish consumers likely to maintain cautious spending plans as personal finances deteriorate

Self-driving technology a major area of investment

Growing elderly demographic key for automotive industry

Companies, brands and innovations

The consumer

Second-hand cars popular among RoI consumers

Figure 2: Ownership of a car bought new or second-hand, by demographics, NI and RoI, March 2014

Irish consumers spending at the lower end of the market

Figure 3: Amount spent on last car – Either new or second-hand, by demographics, NI, March 2014

Figure 4: Amount spent on last car – Either new or second-hand, by demographics, RoI, March 2014

Value driving preference for second-hand cars

Figure 5: Agreement with statements relating to buying cars, by demographics, NI and RoI, March 2014

What we think

Issues and Insights

What factors do Irish consumers consider important when buying a car?

How has the current economic outlook impacted new car registrations?

What types of car ownership arrangements are common in Ireland?

What do Irish consumers think about the process of buying a car?

Are public transport and cycling schemes credible alternatives to purchasing and travelling by car?

Trend Application

Collective Intelligence

Return to the Experts

Mintel futures: Old Gold

Market Overview

Key points

Second-hand dealers key channel in Irish automotive retailing industry

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: oxygen@mintel.com

Automotive Retailing - Ireland - April 2014

Report Price: £1095.00 | \$1773.30 | €1390.99

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

Figure 6: Automotive retailing industry, by type of dealership, IoI, 2014

Figure 7: Automotive retailing industry, by type of dealership, NI and RoI, 2014

Irish consumer confidence grows

Figure 8: Consumer confidence index, NI, September 2008-December 2013

Figure 9: Annualised consumer sentiment index, RoI, 2009-13

RoI consumers' finances improve

Figure 10: How consumers rate their current financial situation, NI and RoI, November 2013-March 2014

Self-driving cars have potential to improve driving experience

Figure 11: Road deaths, IoI, NI and RoI, 2009-13

Baby Boomers a potentially key market for automotive retailers

Figure 12: Population, by age, NI, 2012 and 2024

Figure 13: Population, by age, RoI, 2011 and 2026

Figure 14: Ownership of comprehensive motor insurance, by age, NI and RoI, May 2013

Congestion increases in Ireland's capital cities

Figure 15: Top 10 most congested cities in the UK (including NI), 2011-13

Figure 16: Congestion levels in Dublin, RoI, 2010-12

Figure 17: Ownership of a car, by location, NI and RoI, March 2014

Competitive Context

Key points

Use of public transport increasing in NI, but falls in RoI

Figure 18: Total passenger numbers using public transport (bus and train). NI, 2008-12

Lack of tourists and high job losses see lower RoI public transport usage

Figure 19: Total passenger numbers, by national carrier (bus and train), RoI, 2008-12

Figure 20: Average yearly rail price inflation vs. overall consumer price index (CPI), RoI, 2010-13

Mixed picture for public transport services in Dublin

Figure 21: Total passenger numbers using public transport in Dublin, RoI, 2008-12

Public hire bicycles popular with local authorities and consumers

Figure 22: Total journeys using Dublin Bikes scheme, RoI, April 2010-November 2013

Market Size and Forecast

Key points

New car registrations expected to fall in 2014

Figure 23: Total new car registrations, IoI, NI and RoI, 2007-13

Smaller, cheaper cars driving appeal to cash-constrained consumers

Figure 24: Top 10 car brands, by market share, RoI, 2007-13

Diesel engine popular with RoI consumers

Figure 25: Passenger cars by engine type, RoI, 2007-13

Strengths and Weaknesses

Strengths

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com
 CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
 Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100
 EMAIL: oxygen@mintel.com

Automotive Retailing - Ireland - April 2014

Report Price: £1095.00 | \$1773.30 | €1390.99

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

Weaknesses

Companies and Innovations

Key points

Examples of innovation

'My car knows me'

Solar powered driving

Toyota's FV2 concept car reflects drivers mood

Company profiles

Agnew Group

Audi Ireland

BMW Ireland

Charles Hurst

Donnelly Group

Mercedes-Benz Ireland

MSL (Motor Services Limited) Motor Group

Nissan Ireland

Opel Ireland

Peugeot Ireland

Renault Ireland

Toyota Ireland

The Consumer – Car Ownership

Key points

Majority of Irish consumers personally own a car

Figure 26: Ownership of a car, by demographics, NI and RoI, March 2014

Figure 27: Consumers that personally own a car, by gender and age, NI and RoI, March 2014

Young consumers least likely to own a car

Figure 28: Consumers that do not personally own a car, by age, NI and RoI, March 2014

Figure 29: Average yearly youth unemployment (18-24 year olds) rate vs. total unemployment rate, RoI, 2011-14

RoI consumers most likely to purchase second-hand cars

Figure 30: Ownership of a car bought new or second-hand, NI and RoI, March 2014

ABC1s just as likely to own a second-hand car

Figure 31: Consumers that bought a second-hand car more than two years ago, by social class, NI and RoI, March 2014

Over-35s bought new car more than two years ago

Figure 32: Consumers that have bought a new car more than two years ago, by gender and age, NI and RoI, March 2014

Figure 33: Ownership of a car bought new or second-hand, by gender, NI and RoI, March 2014

Consumers in full-time employment buying new cars more recently

Figure 34: Consumers that have bought a new car less than two years ago, by work status, NI and RoI, March 2014

The Consumer – Amount Irish Consumers Spent On Their Last Car

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: oxygen@mintel.com

Automotive Retailing - Ireland - April 2014

Report Price: £1095.00 | \$1773.30 | €1390.99

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

Key points

NI consumers spent £5,001-£10,000 on their last car

Figure 35: Amount spent on last car – Either new or second-hand, by demographics, NI, March 2014

Figure 36: Consumers spending up to £5,000, £5,001-£10,001 and £10,001-£15,000 on their last car – Either new or second-hand, by gender and age, NI, March 2014

Third of RoI consumers spent up to €6,000 on last car

Figure 37: Amount spent on last car – Either new or second-hand, by demographics, RoI, March 2014

Figure 38: Consumers spending up to €6,000 on their last car – Either new or second-hand, by work status, RoI, March 2014

The Consumer – Attitudes Towards Automotive Retailing

Key points

Second-hand cars seen as better value

Figure 39: Agreement with statements relating to buying cars, by demographics, NI and RoI, March 2014

NI students most likely to prefer second-hand cars

Figure 40: Ownership of a car, by work status, NI and RoI, March 2014

Figure 41: Agreement with the statement 'I prefer to buy second-hand cars as they are better value for money than new cars', by work status, NI and RoI, March 2014

Customer service most important to Baby Boomers

Figure 42: Agreement with the statement 'The customer service offered by a car dealer is very important to me', by age, NI and RoI, March 2014

Figure 43: Agreement with the statement 'The internet has made me more confident when it comes to buying a car (eg online buying guides)' by gender and age, NI and RoI, March 2014

Irish women find buying cars stressful

Figure 44: Agreement with the statement 'I enjoy the process of buying a car', by gender, NI and RoI, March 2014

Figure 45: Agreement with statements relating to buying cars, by gender, NI and RoI, March 2014

Married RoI consumers feel they can negotiate better prices

Figure 46: Agreement with the statement 'I feel I can negotiate much more in the current financial climate', by marital status, NI and RoI, March 2014

Figure 47: Agreement with the statement 'The internet has made me more confident when it comes to buying a car (eg online buying guides)', by marital status, NI and RoI, March 2014

Appendix

NI Toluna data

Figure 48: Ownership of a car, by demographics, NI, March 2014

Figure 49: Ownership of a car bought new or second-hand, by demographics, NI, March 2014

Figure 50: Consumers who do not personally own a car, but have access to a car, by demographics, NI, March 2014

Figure 51: Consumers who do not personally own a car, but have access to a car, by demographics, NI, March 2014

Figure 52: Amount spent on last car – Either new or second-hand, by demographics, NI, March 2014

Figure 53: Agreement with statements relating to buying cars, by demographics, NI, March 2014

Figure 54: Agreement with statements relating to buying cars, by demographics, NI, March 2014 (continued)

Figure 55: Agreement with statements relating to buying cars, by demographics, NI, March 2014 (continued)

RoI Toluna data

Figure 56: Ownership of a car, by demographics, RoI, March 2014

Figure 57: Ownership of a car bought new or second-hand, by demographics, RoI, March 2014

Figure 58: Consumers who do not personally own a car, but have access to a car, by demographics, RoI, March 2014

Figure 59: Amount spent on last car – Either new or second-hand, by demographics, RoI, March 2014

Figure 60: Agreement with statements relating to buying cars, by demographics, RoI, March 2014

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: oxygen@mintel.com

Automotive Retailing - Ireland - April 2014

Report Price: £1095.00 | \$1773.30 | €1390.99

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

Figure 61: Agreement with statements relating to buying cars, by demographics, RoI, March 2014 (continued)

Figure 62: Agreement with statements relating to buying cars, by demographics, RoI, March 2014 (continued)

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100

EMAIL: oxygen@mintel.com