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Willingness to Pay for Vehicle Safety Features: Phase 2 Report

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Abstract

This report examines the amount which Australian car buyers are willing to pay for vehicle safety features that protect occupants in the event of a crash. A series of questionnaires, targeted at private car buyers, fleet managers and car renters, were developed to determine the amount that new car buyers are willingness to pay for a package of safety features including an air bag, and a package of the same safety features, but without an air bag. Across all surveys the willingness to pay for the air bag and non-air bag packages was found to be high. It was estimated that over 80% of new car buyers would be willing to pay the best estimate retail price or more for both the air bag and non-airbag package. Factors which appear to be related to willingness to pay include age, sex, household income and size of car.

Keywords

Willingness To Pay, Occupant Protection, Vehicle Safety, Economic Analysis, Survey.

DEPARTMENT OF TRANSPORT & COMMUNICATIONS

FEDERAL OFFICE OF ROAD SAFETY

WILLINGNESS TO PAY FOR VEHICLE SAFETY FEATURES

November 1992

Prepared By

The Roy Morgan Research Centre Pty. Ltd.

Australia's Nation-wide Research Organisation

Contents

Appendices

N.B The Unit Record Data for each of the Questionnaires has not been included in this report due to the size and complexity of the data sets. This information is being held at the Federal Office of Road Safety (FORS) and can be obtained by writing to:

Director,
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1. Executive Summary

The willingness to pay for vehicle safety measures for private new car buyers was examined in a survey of 515 people who had purchased a new passenger vehicle, costing between $12,000 and $35,000 in the last 2 years. Willingness to pay was determined for a package of safety features excluding an air bag, and a package of the same safety features, but with an air bag. The features contained in the safety packages were those described in the Federal Office of Road Safety report titled, *Feasibility of Occupant Protection Measures (CR 100)*. On average private new car buyers are willing to pay $486 for the non-air bag package, and $1236 for the air bag package.

Importantly, the willingness to pay for the safety features was well in excess of the best estimated retail price as determined in the Federal Office of Road Safety report; *Feasibility of Occupant Protection Measures (CR 100)*. The best estimated retail price is approximately $270 for the non-air bag package, and approximately $700 for the air bag package. It is estimated that 85% of private new car buyers are willing to pay the best estimated retail price or more for the non-airbag package, and that 82% are willing to pay the best estimated retail price or more for the air bag package.

Demographic factors which appear to be related to willingness to pay include age, sex, and household income.

Other factors related to willingness to pay include size and cost of car. With respect to car size, recent buyers of small and medium size cars appear to be more willing to pay than the buyers of large cars.

With respect to cost of car, buyers of more expensive cars tended to be more willing to pay for the safety packages. However, willingness to pay was still quite high for buyers of cars in the lowest price range (less than $20,000). 82% of buyers of low price range cars were still willing to pay the best estimated retail price or more for the non-air bag package and 68% were willing to pay the best estimated retail price or more for the air bag package.

The willingness to pay for these safety measures in fleet cars was examined in a series of three sub-studies.

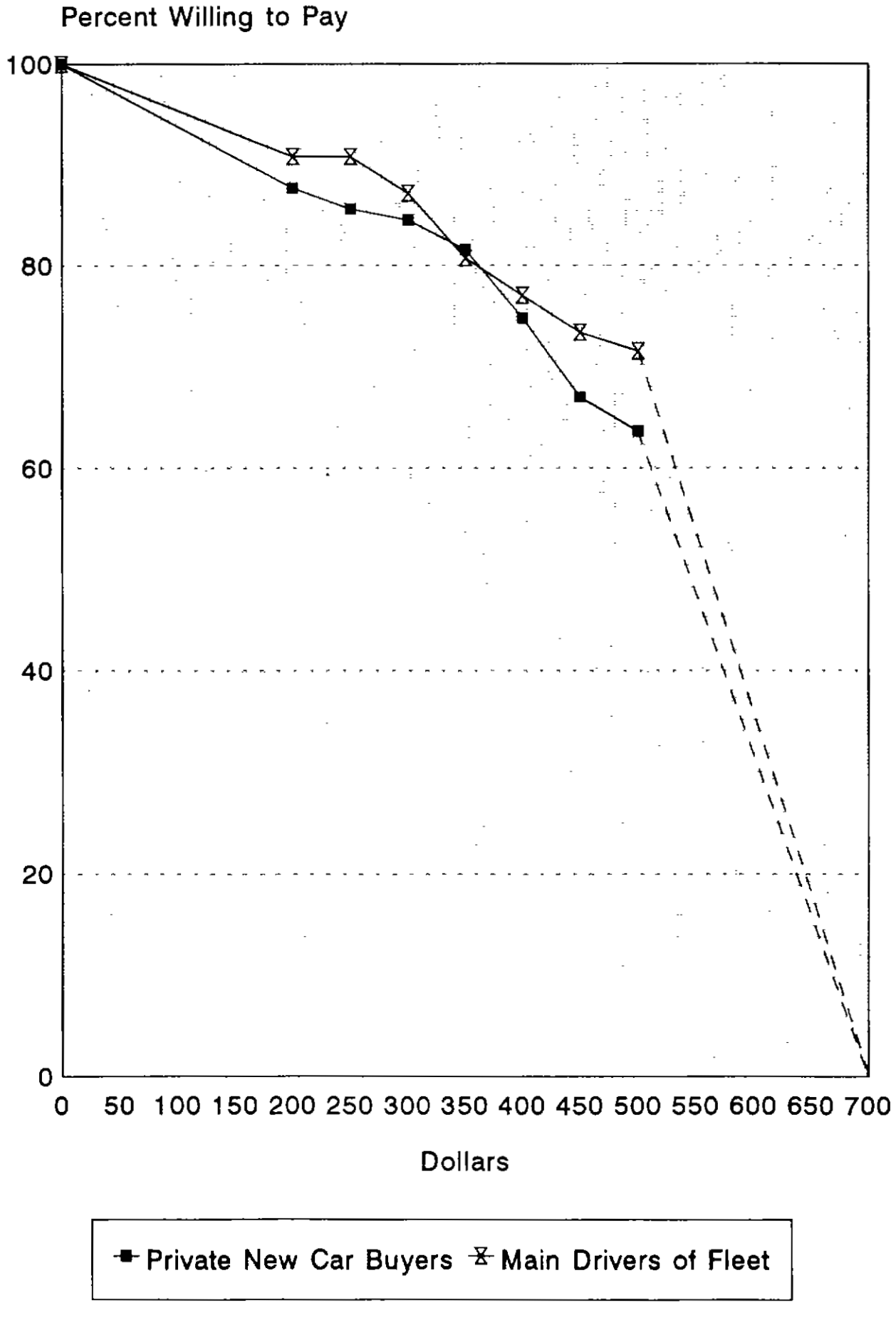
The first sub-study examined people who were the main drivers of fleet cars, and were the main decision maker about the type of car they drive. People typical of this population include some senior executives and small business owners. A sample of 111 people who had made a decision to purchase a new car, registered in a business name and costing between $12,000 and $35,000 in the last 2 years were surveyed. Main drivers of fleet cars were more willing to pay for the safety features than private buyers. On average, main drivers were willing to pay $506 for the non-air bag package and $1301 for the air bag package. It is estimated that 90% of the main drivers of fleet cars would be willing to pay the best estimated retail price or more for the non-air bag package, and 81% would be willing to pay the best estimated retail price or more for the air bag package.

The second sub-study examined the willingness to pay for renters of short term hire cars. A total sample of 50 car renters were interviewed for sub-study 2. Willingness to pay was based on an increase in the daily rental rate for a car with the safety features. It was found that, on average, car renters were willing to pay an additional $3.42 per day for a car fitted with the non-air bag safety package, and $6.50 per day for a car fitted with the air bag safety package. Industry estimates of the approximate increase in rental cost to cover increases in car purchase price were approximately $1 per day for the non-air bag package, and approximately $2 per day for the air bag package. It is estimated that over 90% of renters of short-term hire cars are willing to pay for the industry estimated increase in rental fees.

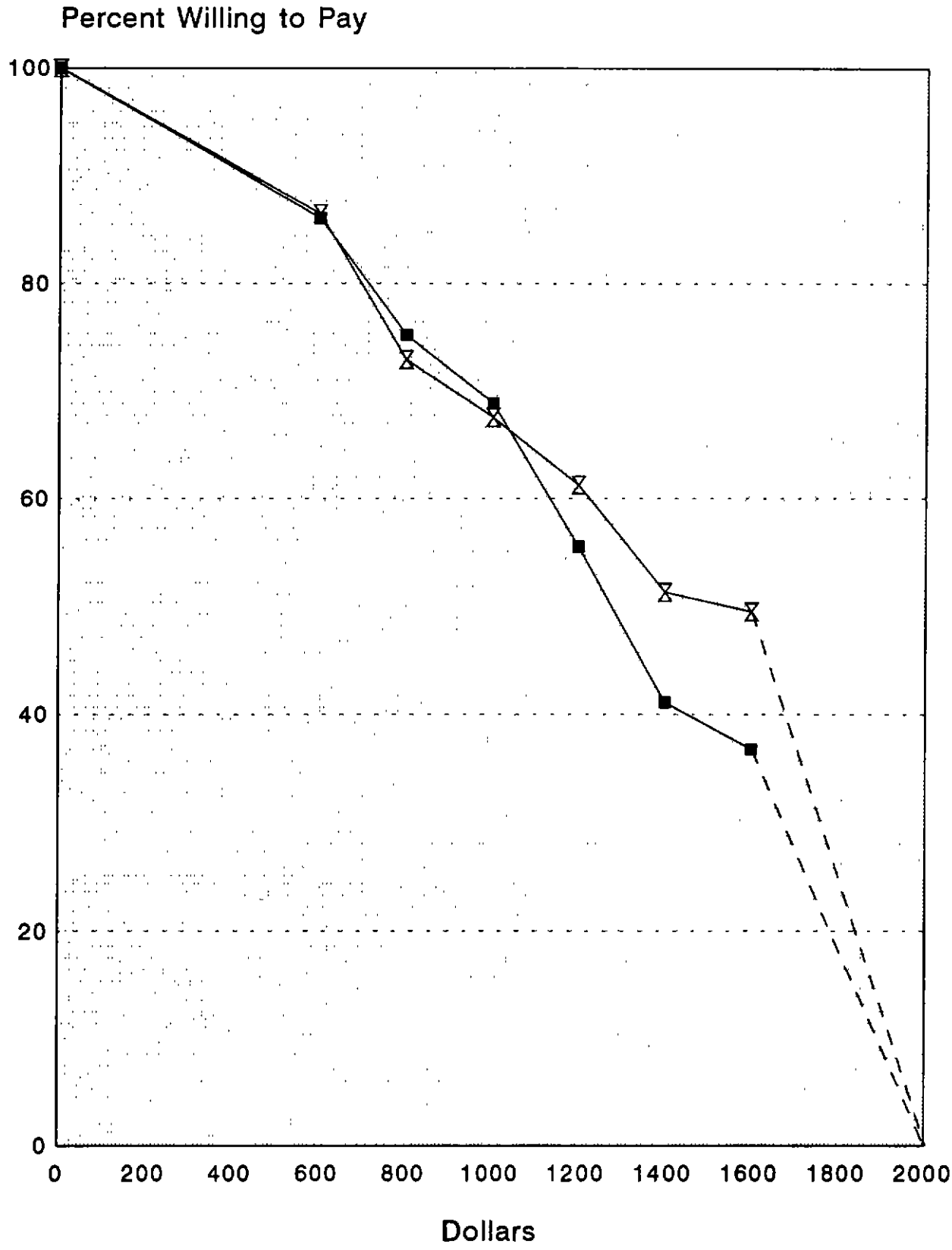
The third sub-study examined the willingness to pay of fleet managers who are responsible for the purchase of cars for their organisation. A sample of thirty fleet managers from both public organisations and private businesses were interviewed. All of the fleet managers were willing to pay the best estimated retail price, or more for the non-air bag package. On average the managers were willing to pay $523 for the non-air bag package. More than 80% of fleet managers were willing to pay the best estimated price or more for the air bag package. Their average willingness to pay was $1296.

Across all of the surveys, willingness to pay for the air bag and non-air bag packages was found to be high. Despite the small sample sizes in the car renters sub-study and fleet managers sub-study, the data is consistent with the willingness to pay as observed in the private buyers survey and main drivers of fleet cars sub-study.

Willingness to Pay for Non-Air Bag Package



Willingness to Pay for Air-bag Package



2. Introduction

This report has been prepared for the Federal Office of Road Safety (FORS) to document the second phase of the Willingness to Pay for Vehicle Safety Measures project. The project forms part of a major review of Australian Design Rules for passenger cars, currently being undertaken by FORS.

Phase 2 of the Willingness to Pay (WTP) project follows research to examine occupant injury in passenger vehicles. The report from this research, Passenger Cars and Occupant Injury, (FORS CR 95), detailed a range of vehicle safety measures to improve occupant protection in the event of a frontal crash. The feasibility of implementing the recommended measures into Australian passenger vehicles was further examined in a cost-benefit analysis study (FORS CR 100). This Willingness to Pay project compliments the previous studies by assessing the extend to which new car buyers in Australia are likely to be willing to pay for such safety features.

Phase 1 of the project (FORS CR 102) examined the suitability of various methodological approaches and survey techniques to undertake the collection of WTP information for vehicle safety features. The phase 1 report recommended that the scope of the WTP project should include both private and fleet buyers who had recently purchased new passenger vehicles. It was also recommended that the survey instrument elicit WTP through a series of "bidding" and "take it or leave it" questions, and be conducted using a face to face interview methodology.

Phase 2 of the WTP project used these recommendations as a basis for the development and conduct of a series of surveys of recent private new car buyers, fleet new car buyers, and car renters which were conducted nationally during August and September, 1992.

This report will detail the research strategy used to conduct phase 2, the methodology, survey design, and findings from the surveys with regard to willingness to pay for vehicle safety features.

3. Research Strategy

Willingness to Pay information was sought regarding two safety packages; an air bag and a non-air bag package. The features contained in the safety packages were those recommended in the FORS CR 100 report. The non-air bag package included the following safety features:

- improvements to seat belt systems;
- improvements to seat design;
- improved leg protection;
- padded steering wheels; and
- seat belt warning devices.

The air bag package included all of the above features, plus a driver side air bag.

The most useful population in order to determine WTP was recent new car purchasers. It was identified from phase 1 that to mitigate hypothetical bias, only people who had made a recent new car purchase should be included in the surveys. It was felt that people who had not faced a real purchase decision may perceive the benefits of safety features differently to recent purchasers.

3.1 Private Buyers Research Strategy

Within the population of new car purchasers, it was identified that two main types of purchaser exist; private buyers and fleet buyers. As approximately 50% of new car purchases are made by fleet buyers, it was considered important that WTP information was collected from both. Intuitively, willingness to pay for safety features may differ considerably between private and fleet purchasers.

The research strategy for private purchasers was undertaken in accordance with the phase 1 recommendations, except that an independent list of people who had recently purchased new cars was obtained through the Roy Morgan Research Centre rather than local motor vehicle manufacturers.

3.2 Fleet Vehicle Research Strategy

A fleet, for the purposes of this research has been defined as one or more passenger vehicles registered in the name of a public or private organisation or enterprise. In order to formulate an appropriate research strategy to collect information about willingness to pay for safety measures in fleet vehicles, a series of discussions were held with several fleet managers. The managers included representatives from both public and private fleets.

From these discussions it became evident that a number of variables affect willingness to pay for vehicle safety measures in fleet vehicles. These are:

- whether the car is purchased or leased;
- whether the fleet manager makes decisions about options included with the car, or not; and
- whether the car is used as an organisational car, or by an individual.

Purchasing v Leasing

Two broad types of fleet arrangement exist. The first type of arrangement involves purchasing the vehicles used in the fleet. Examples include fleet owners such as Hertz, Avis, Commonwealth Department of Administrative Services (DAS) Fleet, Custom Fleet, and other organisations who buy cars for some of their staff. The second type of arrangement involves obtaining vehicles through long term **lease** arrangements. Examples of organisations who obtain vehicles in this way include all Commonwealth Government Departments (who lease from DAS) and an undetermined number of private sector organisations (who lease from companies such as Custom Fleet).

Decision Maker

Within the type of fleet arrangement, there is another level of variation with regard to who makes the decision about which type of car is leased or purchased; the decision maker being the most appropriate person to interview regarding fitting of safety options. In some cases the decision about the type of car purchased is made by the fleet manager, but in other cases it is made by another individual or organisation. A number of examples follow which illustrate this variation.

Custom Fleet is a commercial fleet which arranges long term leases of vehicles to clients. Although the fleet manager of Custom Fleet actually purchases the car, the decision about which type of car is purchased, or the features included in the car are made by the client.
Unlike Custom Fleet, the fleet managers for Hertz and Avis make the decision about which vehicles are purchased for their short term rental fleets. The managers indicated that they purchased on the perceived needs and wants of the market. The levels of specification purchased varies between vehicles to meet the needs of different market segments.

DAS Fleet provides an important example of a fleet where the decision about the type of cars purchased varies between the fleet manager and the clients. The decision about which cars are purchased for long term leases are made by the clients of DAS Fleet, whereas the decision about which cars are purchased for the short term rental fleet are made by the DAS Fleet manager.

Individual v Organisation Cars

The third variable which needs to be considered with regard to fleet cars is the person for whom the car is leased or purchased. In some cases fleet cars are purchased or leased for **individuals** who actually choose the type of car they wish to drive. Some senior executives fall into this category. In other cases the car is purchased with the intention of being driven by a number of people and considered as an **organisational** vehicle.

The following diagram illustrates the different type of fleet arrangements by the factors mentioned above, and the research strategy for examining willingness to pay for vehicle safety options in fleet cars.

Research Strategy for Fleet Cars

Fleet Arrangements	Fleet Manager	Organisational Cars	Cars for Individuals
Purchasing	Decision Maker	Sub-study 2 & 3	
	Not Decision Maker	Not included	Sub-study 1
Leasing	Decision Maker	Sub-study 3	
	Not Decision Maker	Not included	Sub-study 1

Three sub-studies were undertaken in addition to the main survey of private purchasers.

The first sub-study involved expanding the private buyers survey to include people who were the main drivers of fleet cars, and also choose which type of car they drive. This sub-study aimed to identify the willingness to pay for some senior executives and self employed people.

The second sub-study examined the willingness of short-term rental customers to pay an increase in rental rates based on the expectation that increases in the purchase price of motor vehicles would be passed on by rental companies to consumers. A sample of fifty renters were interviewed from three different rental companies.

The study was conducted to take account of fleet managers who purchase cars in order to meet the perceived needs of the market. It is assumed that purchasing behaviour of these fleet managers will be driven by customers willingness to pay for safety features, and thus, the best measure of willingness to pay is obtained from the customer.

The third sub-study examined the decision making process of fleet managers who select the type of cars purchased or leased for their fleet. A sample of thirty fleet managers were interviewed. The sample coved fleet managers from both public and private sector organisations. The main purpose of this sub-study was to identify the criteria used by fleet managers in making purchase or lease decisions, and to see how highly safety rates.

The research strategy for fleet cars did not attempt to examine purchasers of organisational cars where the decision was not made by the fleet manager, that is the two "not included" categories in the above diagram. It was anticipated that in some cases the decision of which cars are purchased would be made by people outside the organisation actually purchasing, such as clients in lease arrangements with Custom Fleet. In other situations, the actual decision maker may not be easily identifiable within an organisation, particularly in cases where a fleet manager is leasing organisational cars, but is not the decision maker as to which cars are leased.

The strategy for fleet vehicles was devised to explore the issues involved with willingness to pay for vehicle safety features in a large scale qualitative manner. The small sample sizes used in each of the fleet vehicle sub-studies reflect the reasonable assumption put forward in the phase 1 report, that the people responsible for the purchase or lease of fleet vehicles within each sub-study are likely to be more homogeneous than private new car buyers. It was considered that private new car buyers would be the population most sensitive to the price of safety features in new cars.

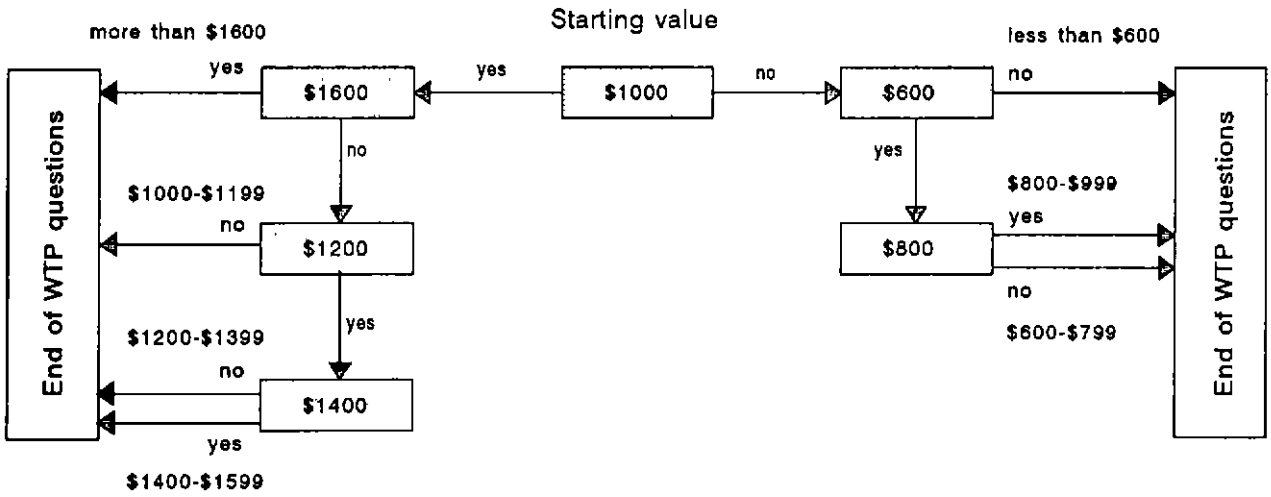
4. Methodology

4.1 Survey Design

The survey was designed to collect willingness to pay information about both the air bag and non-air bag packages. This information was collected in the main private buyers survey and the three sub-studies.

The mechanism for determining willingness to pay was a form of contingent valuation. The particular contingent valuation technique used for all phase 2 surveys was an extended version of the "take it or leave it" approach. Each respondent was asked a series of questions about wether they would be prepared to pay specified dollar amounts to have the safety features provided in a new car. The questions were structured to find the range of a persons willingness to pay. The following diagram displays the sequence by which willingness to pay was determined for the air bag package with a starting point of $1000.

Example: Willingness to Pay for Airbag Package.
$1000 starting point.



The survey was designed to collect willingness to pay using three different starting dollar values for both the air bag and non-air bag packages. The starting values were designed to correspond with the best estimated retail prices obtained from FORS CR 100. The starting values for the air bag package were: $800, $1000, and $1200. The starting values for the non-air bag package were $300, $350 and $400. These starting values for the two safety packages were paired by rank (ie. the lowest value for each package, the middle values for each package and the highest values for each package). This pairing of starting dollar values resulted in three variations of the questionnaire, as a single respondent would only be asked about their willingness to pay for each package once. This process was undertaken to eliminate starting point bias.

The order in which people were asked to consider their willingness to pay for each package was also varied. This was done in order to avoid creating an order bias, where a persons willingness to pay for the second package they are asked to consider is affected by their responses to the first package considered. Half of the responses to the survey were collected using questionnaires where the non-air bag package was presented first, and the other half with questionnaires where the air bag package was presented first.

In all, six versions of the questionnaire were used for the private buyers survey. This consisted of three variations of starting dollar values by two variations of the order in which the safety packages were presented. The questionnaires for the second and third sub-studies used only one pair of starting values; $2 and $5 per day for the car renters sub-study, and $350 and $1000 for the fleet managers sub-study. This was due to the relatively small sample sizes. The ordering of the safety packages was rotated however, resulting in two versions of the questionnaires for each sub-study.

Prior to asking the willingness to pay questions, respondents were provided with information to assist them in making an informed and objective valuation of the safety packages. The information included a brief description of the effects of a frontal collision, a simple description of each of the safety features, and an indication of the effectiveness of the package in reducing occupant injuries and fatalities. Prompt cards depicting the location of the features in a car, and how an air bag works were also shown. Respondents in both the main survey and the sub-studies were provided with the same information, and shown the same prompt cards. The information provided to respondents was intended to emulate marketing information used by manufacturers if the safety packages became available.

In addition to collecting information about willingness to pay, respondents were also asked questions about the factors they considered in purchasing their car, and willingness to trade additional features purchased on their car in order to afford safety features. Demographic information was also collected in order to examine willingness to pay for different groups.

Appendix 1 contains one version of the questionnaire from the private buyers survey. Appendix 2 contains one version of the questionnaire from the second sub-study (renters), and appendix 3 contains a questionnaire from the third sub-study (fleet managers). Appendix 4 displays the prompt cards used in the main survey. Most of these prompt cards were used in the surveys for sub-studies 2 and 3.

4.2 The Sample

4.2.1 Private Buyers Survey and Sub-study 1 (Non-Privately Registered)

A sample of 515 recent new car buyers of privately registered vehicles were interviewed for the main willingness to pay survey. For sub-study 1, an additional 111 main drivers of recently purchased, non-privately registered (fleet) cars were also interviewed. The additional sample was comprised of main drivers of fleet cars who chose the type of car they drive. Of these 111 respondents, 48 were the main drivers of leased cars and 60 were the main drivers of purchased cars. Three drivers couldn't say whether the car was purchased or leased.

Most of the respondents interviewed for the main survey were selected from a list of recent new car purchasers. The list was obtained from the Roy Morgan Research Centre Consumer Opinion Trends Survey (COT). To ensure an appropriately sized sample could be obtained, it was necessary to include people identified as having purchased a car in the last 2 years. The geographic spread covered all mainland state capital cities and Canberra.

After contacting all of the listed names, a total of 398 interviews were obtained with owners of privately registered vehicles and 111 interviews with the main drivers of fleet vehicles. To achieve the desired sample of 500 purchasers of privately registered vehicles, a number of intercept interviews were conducted at car parks in Perth, Adelaide, Melbourne and Sydney. The intercept interviews yielded an additional 117 respondents.

A comparison between the respondents selected from the COT Survey and those intercepted at car parks was conducted using Chi-square tests of independence. The null hypotheses for the tests were that willingness to pay for the non-air bag package, and the air bag package is independent of whether the respondents were selected from the COT or intercepted at a car park. The data failed to reject both null hypotheses. For the non-air bag package, Chi-square = 14.2, df=8, p=0.12. For the air bag package, Chi-square = 2.68, df=6, p=0.92. Thus, it can be assumed that willingness to pay for both packages is independent of the way in which respondents were selected for the survey.

4.2.2 Sub-study 2 (Car Renters)

A sample of 50 car renters were interviewed for sub-study 2. The respondents were intercepted following the rental or return of a rental car at three depots, two in Melbourne and one in Sydney. The participating rental companies were Avis, Hertz, and Thrifty.

4.2.3 Sub-study 3 (Fleet Managers)

A sample of 30 fleet mangers were interviewed about their willingness to pay for safety features in the cars that they decide to buy or lease. The sample was selected from a number of private organisation and government organisations. The organisations were selected randomly from the telephone book. Selected organisations were located in Melbourne and Canberra.

5. Findings

5.1 Main survey

New Car buyers of Privately Registered Passenger Vehicles

The data from the survey of new car buyers of privately registered passenger vehicles has been weighted to provide estimates of willingness to pay for all Mainland State capitals and Canberra. The data was weighted by area, with Paxus figures of private new vehicle registrations in the survey price range over the period of July 1990 to July 1992.

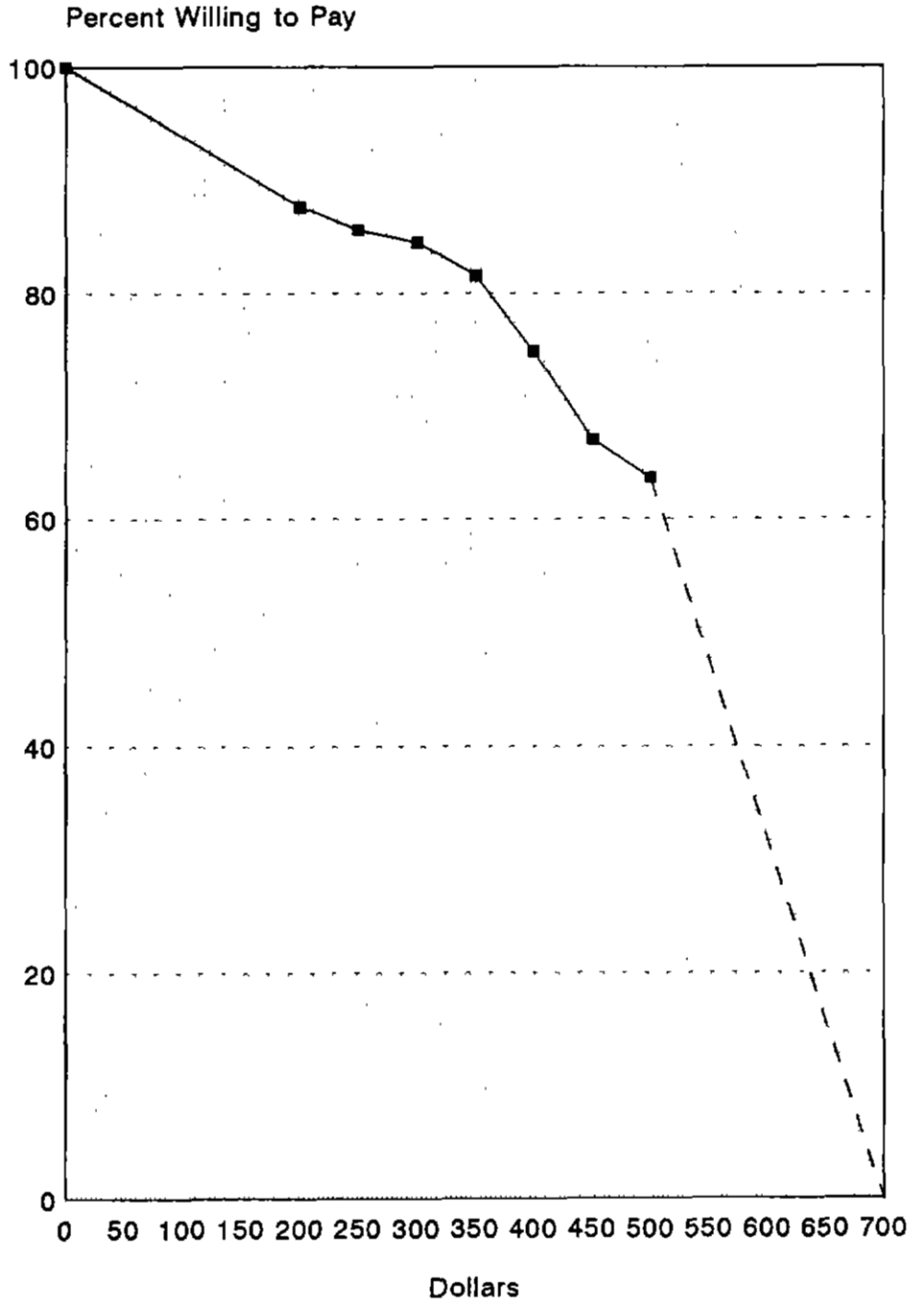
It should be noted that for the purposes of calculating and plotting willingness to pay functions, assumptions were made about the point at which all respondents would not pay for the safety packages (end point). For example, it was found that 62% of respondents are willing to pay $500 or more for the non-air bag safety package. In order to calculate average willingness to pay, it was assumed that none of the respondents would pay $700 or more. It could be expected that the actual value of the point at which all respondents would decline to pay is much greater than $700. An analysis of the data using linear regression found the end point to be approximately $1679 ($R^2$= 0.94).

The end point values for all willingness to pay functions were chosen as being highly conservative, and thus reducing the possibility that the average willingness to pay figures are over-estimates. This is also reflected by most of the average willingness to pay figures being less than the median willingness to pay value, as calculated using the selected end points.

5.1.1 Willingness to Pay for the Non-Air Bag Package

The willingness to pay function for private new car buyers with regard to the non-air bag package of safety features is displayed in figure 1. This population's average willingness to pay for the non-air bag package is calculated to be $486. It can be seen from figure 1 that 62% of new car buyers of privately registered passenger cars were willing to pay $500 or more.

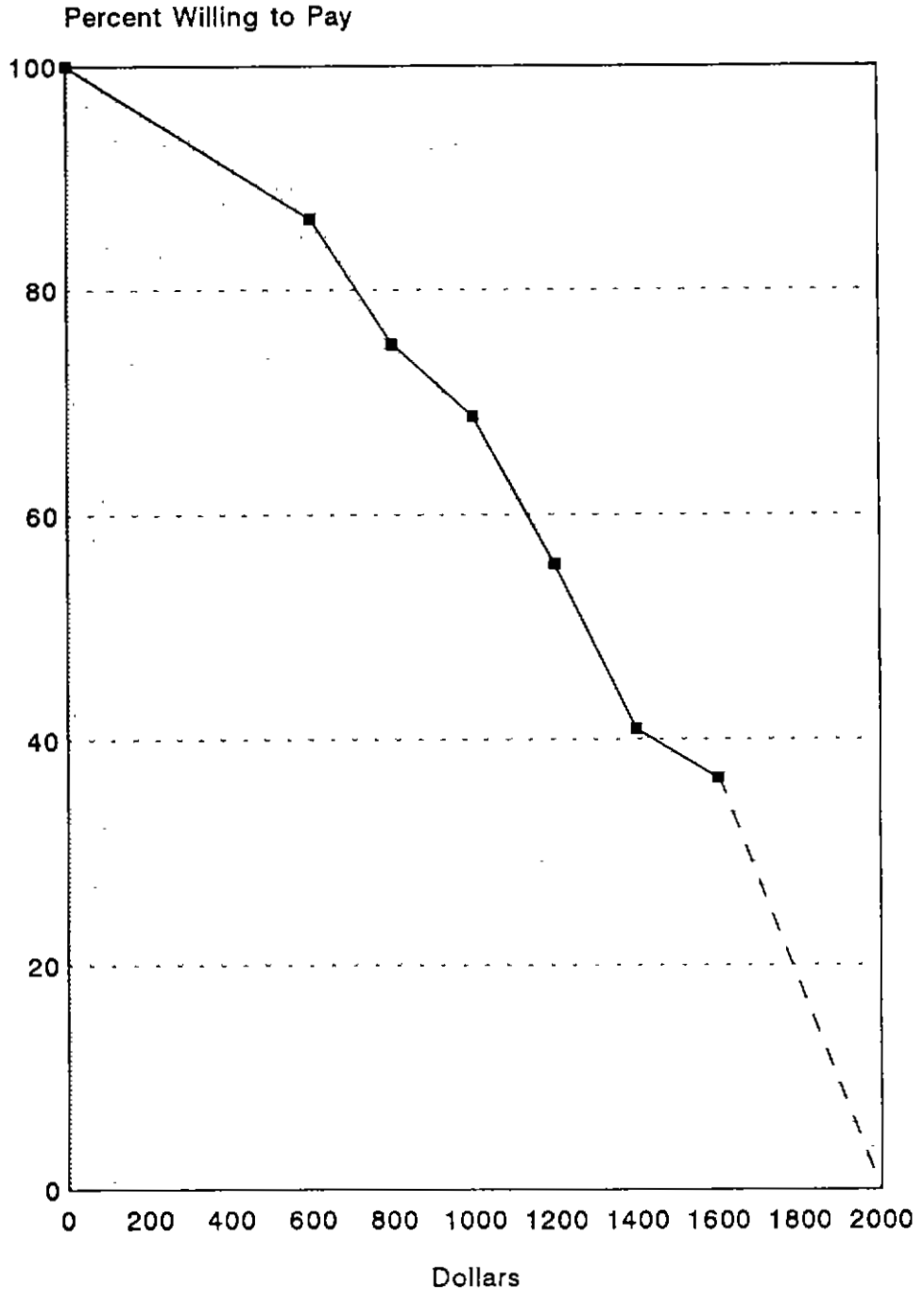
Figure 1: Private New Car Buyers Willingness to Pay for Non-Air Bag Package



5.1.2 Willingness to Pay for the Air Bag Package

Figure 2 displays the willingness to pay function of private new car buyers for the package of safety features which includes the air bag. The average willingness to pay estimate is $1236, with 36% of new car buyers willing to pay at least $1600. It should be noted that, for the purposes of calculating average willingness to pay, it was assumed no respondent would pay more than $2000.

Figure 2: Private New Car Buyers Willingness to Pay for Air-bag Package



5.1.3 Willingness to Pay by Sex

The willingness to pay for both the air bag and non-air bag safety packages varied by sex, though the differences tended to be quite small. Women were willing to pay slightly more for the safety features than men, with an average willingness to pay value of $505 for the non-air bag package and $1261 for the air bag package. Men were willing to pay an average of $472 for the non-air bag package and $1218 for the air bag package.

5.1.4 Willingness to Pay by Age

People aged 25 to 34 years were more willing to pay for both packages than people in other age categories. The average willingness to pay for the non-air bag package was $498, and $1369 for the air bag package. The age group who were least willing to pay varied between safety packages. People aged 50 and over were less willing to pay for the non-air bag package with an average WTP value of $474. People aged 18 to 24 years were least willing to pay for the air bag package with an average WTP value of $1160.

5.1.5 Willingness to Pay by Area

Most capital cities exhibited similar average WTP values for the non-air bag package. The one exception being Canberra with an average WTP value of $573, which is $83 higher than that of the Perth, the city with the second highest WTP value. It is estimated that 87% of Canberra private new car buyers would pay $500 or more for the non-air bag package.

Like the non-air bag package, most capital cities exhibited similar average WTP values, except for Sydney private new car buyers. The average WTP value for Sydney was $1291, compared to $1220 for Canberra; the next highest average WTP value.

It should again be noted that the data from the survey of new car buyers has been weighted proportionately to the number of new car registrations in each main land state capital and Canberra.

5.1.6 Willingness to Pay by Number of Children in Household

For the non-air bag package there is little difference between average WTP where there is one child resident in the household ($488) and no children resident in the household ($479). The average WTP value when there are two or more children resident in the household ($507) is, however, higher than households with no resident children.

With regard to the air bag package, the group most willing to pay are households with no resident children ($1249), followed by households with two or more resident children ($1234), and households with one child ($1181).

The average WTP value of the non-air bag package for parents is $502, nearly $100 greater than the average WTP value for non-parents ($403). Similarly, the average WTP value of the air bag package for parents is $1218 compared to $994 for non-parents.

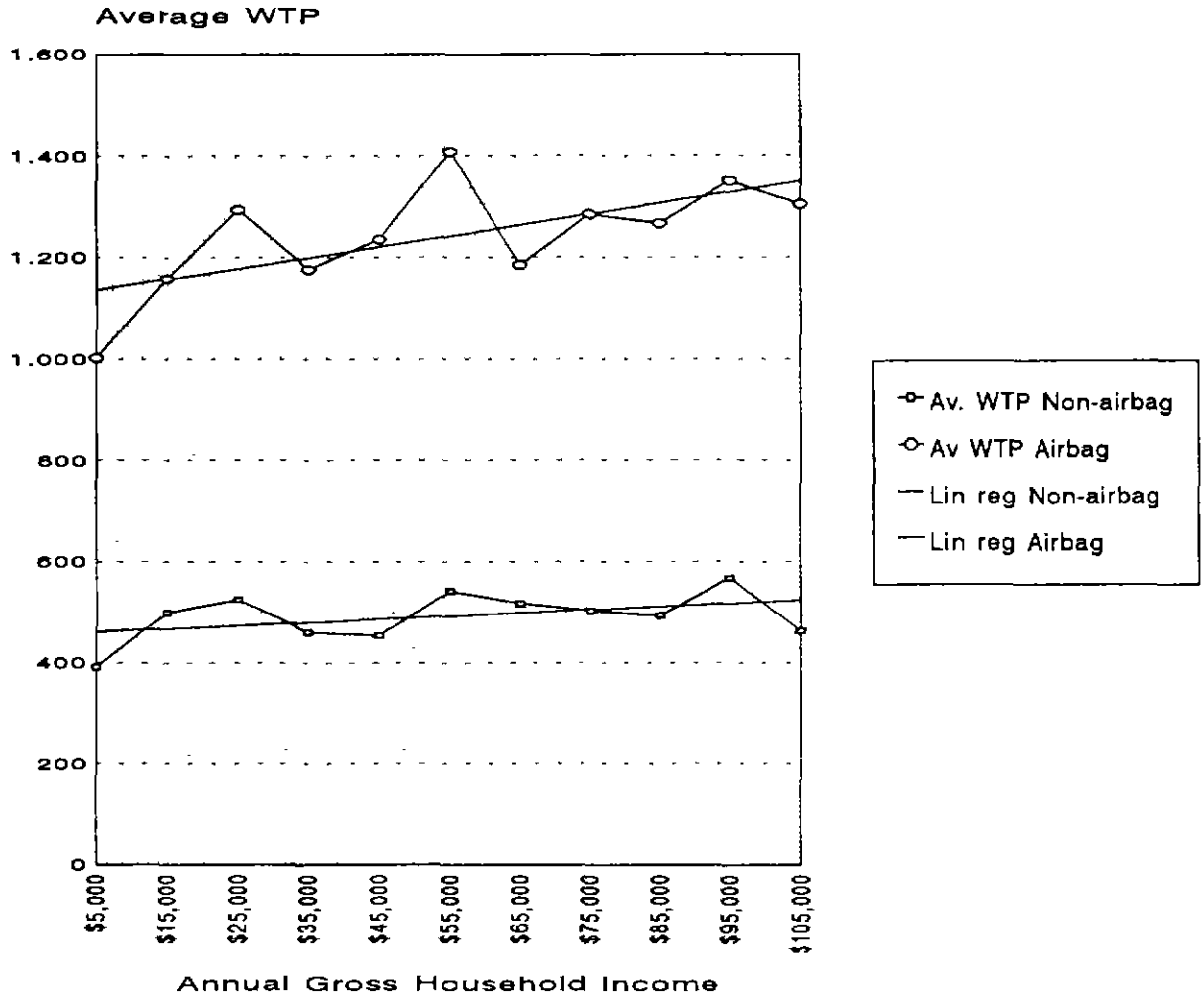
5.1.7 Willingness to Pay by Household Income

Figure 3 displays the average willingness to pay values for the non-air bag and the air bag packages by gross annual household income. Corresponding lines of regression have also been plotted.

It can be seen that there is a small positive relationship between household income and willingness to pay for the non-air bag package (r=0.42). The majority of new car buyers, even with restricted incomes are prepared to pay $500 or more to obtain the benefits of the package.

A stronger relationship between household income and willingness to pay is evident for the air bag package (r=0.65). It can be seen that people with higher household incomes are more willing to pay for the inclusion of the air bag package, than those with lower household incomes.

Figure 3: Private New Car Buyers Average Willingness to Pay by Household Income



5.1.8 Willingness to Pay by Car Related Factors

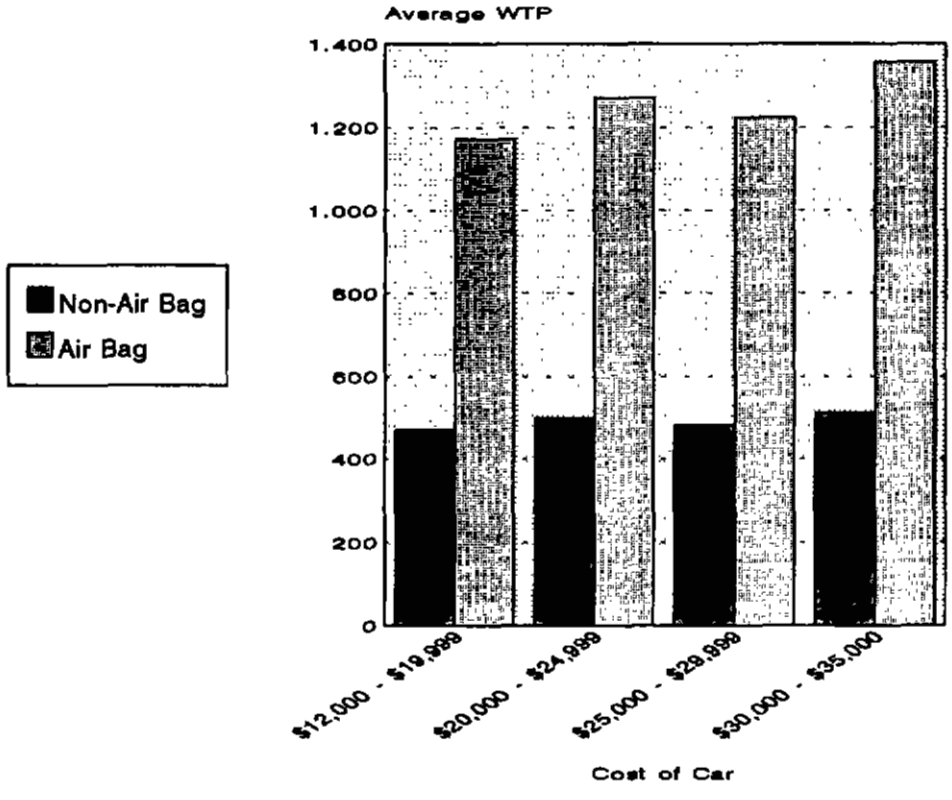
The size of car purchased seems to be related to average willingness to pay for the air bag package. Small car buyers had an average WTP value of $1234, compared to medium car buyers with $1289 and large car buyers with $1141. These differences may be related to the perceived level of safety by buyers of large cars compared to smaller cars, or the demographic characteristics of large car buyers. There is little difference between buyers of different sized cars in relation to average WTP for the non-air bag package.

This is also reflected in the make of car purchased, where GMH and Ford new car buyers are less willing to pay for both of the safety packages when compared to buyers of other makes. GMH new car buyers are willing to pay, on average, $473 for the non-air bag package and $1178 for the air bag package. Ford new car buyers are willing to pay on average, $475 for the non-air bag package and $1128 for the air bag package. As Ford and GMH are the main retailers of large cars, these findings appear to be consistent with those relating to the effect of size of car on average WTP.

5.1.9 Willingness to Pay by Cost of Car

Cost of car appears to be a good indicator of willingness to pay. Figure 4 displays the average willingness to pay value for both the non-air bag and the air bag package by cost of the car. It can be seen that buyers of more expensive cars are more WTP for both the non-air bag and air bag package than buyers of cars in the lowest price range.

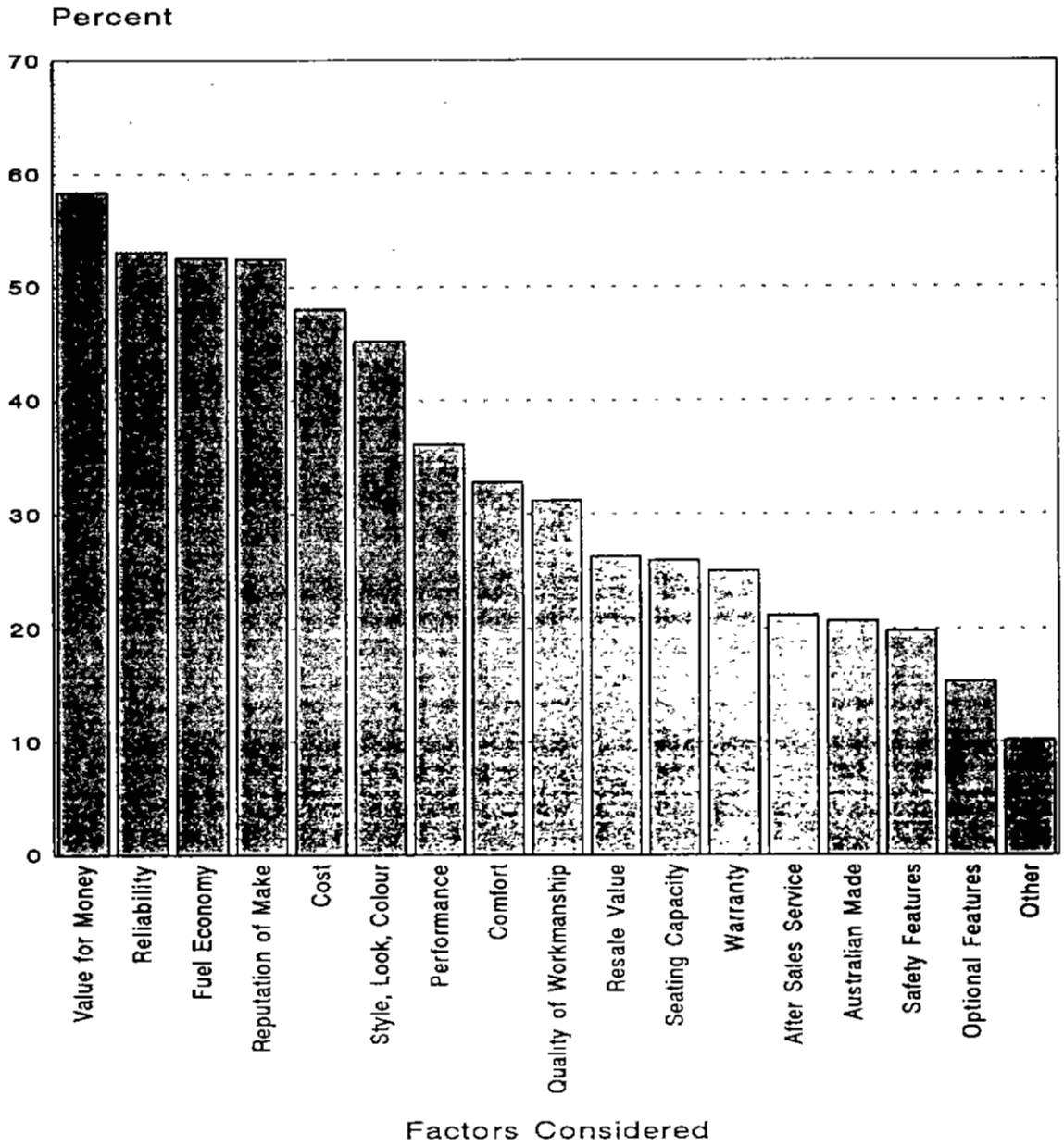
Figure 4: Private New Car Buyers Average WTP by Cost of Car



5.1.10 All Factors Considered in Choosing Which Car to Buy

Figure 5 displays the percentage of respondents that considered various factors when deciding which car to buy. Value for money was considered by 58% of new car buyers when determining which car to buy. This was the most commonly reported factor. Other factors which were frequently considered are reliability (53%), fuel economy (53%) and reputation of make and model (52%). Safety features was reported as being a consideration by 20% of private new car buyers. The frequency with which this factor was considered is ranked fifteenth out of the sixteen factors presented to respondents.

Figure 5: Factors Considered by Private New Car Buyers When Choosing Which Car to Buy

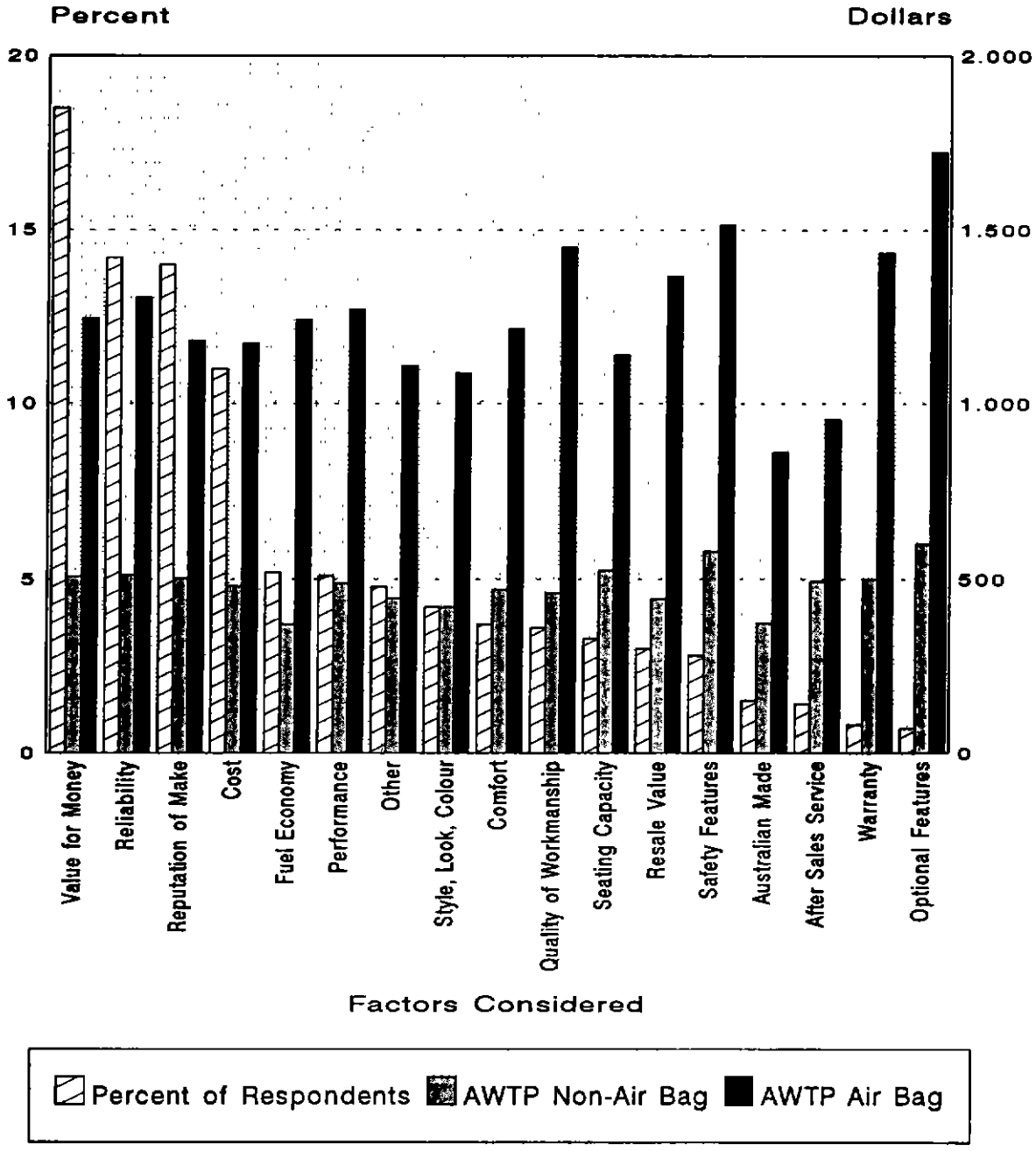


5.1.11 Main Factor Considered in Buying the Car

The most reported main factor considered when deciding which car to buy is value for money (18%). This was followed by reliability (14%), reputation of make/model (14%) and cost (11%). It is estimated that only 3% of new car buyers consider safety features as the main factor when buying a car. This is an interesting finding in view of the high willingness to pay for the safety packages. One possible explanation may be the relative lack of safety options currently available for new cars in the $12,000 to $35,000 price range. Although recent developments such as ABS braking have become available on some models, for many of the respondents in this survey, there would have been little variation between cars in terms of safety options at the time of purchase. Thus safety features would not be a major factor in the buyer's consideration.

Figure 6 displays the percentage of respondents by main factor considered and average willingness to pay for the non-air bag and air bag packages by main factor considered.

Figure 6: Main Factor Considered and Average Willingness to Pay by Main Factor Considered



It can be seen from figure 6, that people who consider optional features to be the most important factor in deciding which car to buy have high willingness to pay for both the non-air bag and air bag packages when compared to people who consider other factors as the most important. Other high levels of willingness to pay for both packages can be seen for people who consider safety features as the most important. People who consider the purchase of an Australian made car as the most important factor have relatively low willingness to pay for both packages.

5.1.12 Willingness to Pay by Features Purchased at Additional Cost

As could be expected, new car buyers who purchased at least one feature on their car at additional cost were more willing to pay for both the non-air bag and air bag packages. For the non-air bag package, people who purchased at least one feature were willing to pay $501 on average, compared to $456 dollars for those who did not purchase any features at additional cost. For the air bag package the average willingness to pay was $1276 for people who had purchased at least one feature at additional cost, compared to $1198 for those who had not.

5.1.13 Additional Features Trade-Off

Of those private new car buyers who purchased features on their car at additional cost, 76% indicated that they would have purchased the non-air bag package as well as the additional features. 6% indicated that they would purchase the non-air bag package instead of the additional features. 15% indicated that they would not purchase the non-air bag package.

When considering the trade off between additional features and the air bag package, 73% of new car buyers who purchased features at additional cost indicated that they would buy both. 9% indicated that they would buy the air bag package instead of the additional features, and 15% indicated that they would not buy the air bag package at all.

5.1.14 Make/Model of Car Trade-Off

When considering the make and model of the car they purchased and the air bag package, 75% of all new car buyers indicated that they would pay extra for the safety features, rather than buying a cheaper make or model of car. 9% felt that they would buy a cheaper make and model of car so they could afford the safety features, while 12% indicated that they would not buy the air bag package at all.

A higher proportion of respondents (82%) felt that they would pay extra for the non-air bag package, rather than buying a cheaper make or model of car. Only 5% felt that they would buy a cheaper make or model in order to afford the features, and again 12% felt that they would not buy the non-air bag package at all.

5.2 Sub-study 1

Main Drivers of Vehicles Registered in a Business Name, Who Choose the Car They Drive.

The data for the main drivers of vehicles registered in a business name has not been weighted. Although Paxus data on new fleet vehicle registrations is available, this can not be broken down to provide a population size for the number of fleet vehicles registered in the name of a business where the main driver chose the type of car purchased.

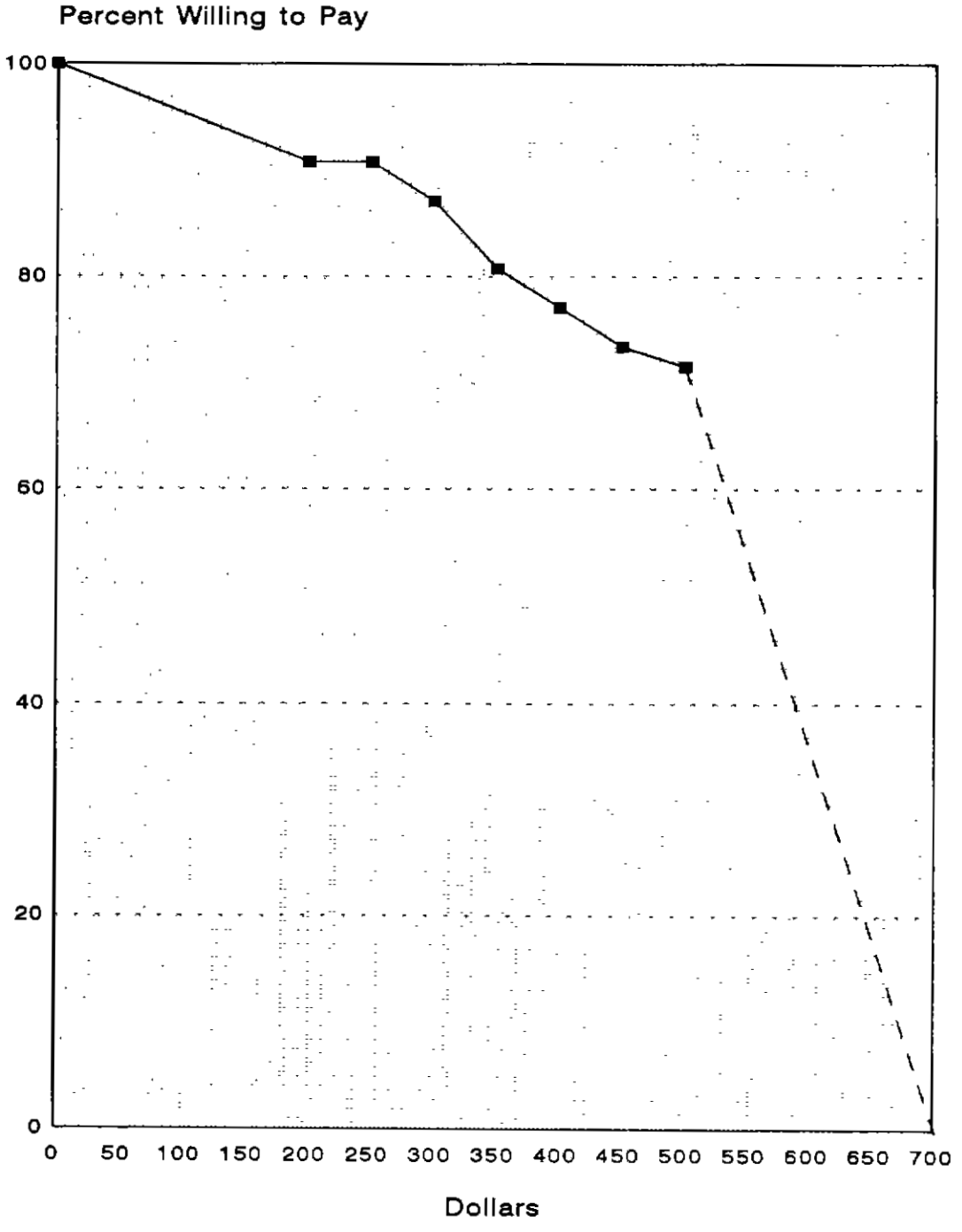
Again it should be noted that for the purposes of calculating and plotting willingness to pay functions, assumptions were made about the point at which all respondents would not pay for the safety packages (end point). The end point values for all willingness to pay functions were chosen as being highly conservative, and thus reducing the possibility that the average willingness to pay figures are over-estimates.

The sample of main drivers interviewed was split between fleet cars which had been purchased and fleet cars which had been leased. 48 main drivers of leased fleet cars were interviewed compared to 60 main drivers of purchased fleet cars. As, the willingness to pay functions for both leased and purchased cars was very similar, the responses from the main drivers of both types of car have been combined. The average WTP value for non-air bag option in leased cars was $506, compared to $503 in purchased cars. The average WTP value for the air bag option in leased cars was $1277 and $1332 for purchased cars.

5.2.1 Willingness to Pay for the Non-Air Bag Package

The willingness to pay function for the main drivers of fleet cars (who choose the type of car they drive), with regard to the non-air bag package of safety features is displayed in figure 7. The average willingness to pay for the non-air bag package is calculated to be $506. It can be seen from figure 7 that 72% of the main drivers of fleet cars were willing to pay $500 or more. It is interesting to note that the average WTP value for private buyers was $486, and only 62% were willing to pay $500 or more.

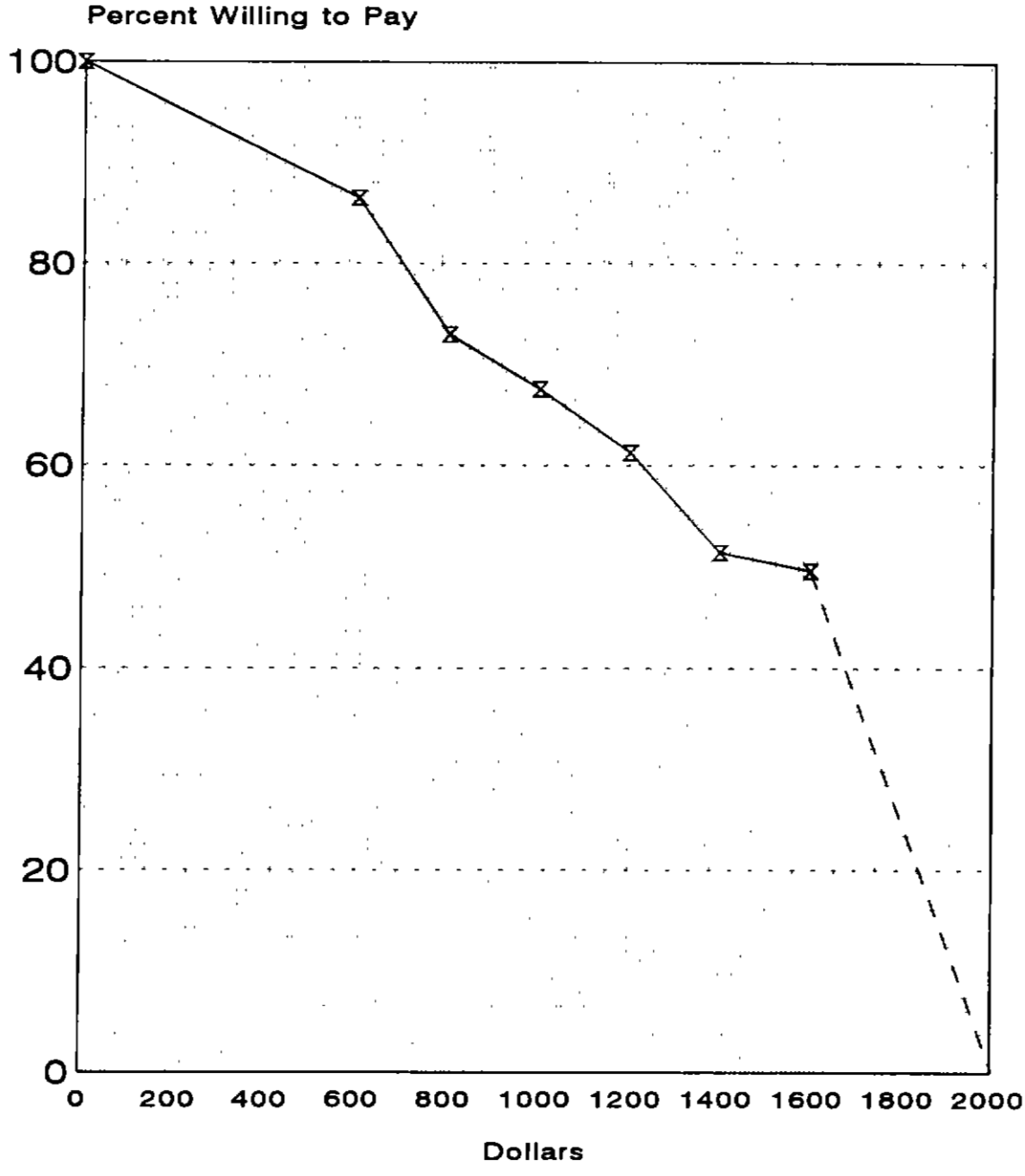
Figure 7: Main Drivers of Fleet Cars Willingness to Pay for Non-Air Bag Package



5.2.2 Willingness to Pay for the Air Bag Package

Figure 8 displays the willingness to pay function of the main drivers of fleet vehicles for the package of safety features which includes the air bag. The average willingness to pay estimate is $1301, with 49% willing to pay at least $1600. Again the private buyers were not as willing to pay for the air bag package as were the main drivers of fleet cars with private buyers having an average WTP value of $1236, and only 36% willing to pay $1600 or more.

Figure 8: Main Drivers of Fleet Cars Willingness to Pay for Air-bag Package



5.2.3 Willingness to Pay by Sex

Unlike the private purchasers, the willingness to pay for both the air bag and non-air bag safety packages for males and females was not significantly different. Women were willing to pay, on average, $499 for the non-air bag package and $1296 for the air bag package. Men were willing to pay an average of $508 for the non-air bag package and $1302 for the non-air bag package.

5.2.4 Willingness to Pay by Age

As with the buyers of new privately registered cars, people aged 25 to 34 years were more willing to pay for the non-air bag package, than people in other age categories. The average WTP values being $533 for the non-air bag package and $1376 for the air bag package. People aged 50 or more were more willing to pay for the air bag package than other age groups. Their average willingness to pay being $491 for the non-air bag package and $1405 for the air bag package. For both the air bag and non-air bag packages, people aged 35-49 were the least willing to pay with average WTP values of $1232 and $488 respectively.

Analysis of willingness to pay by other demographic variables becomes unreliable due to the relatively small sample in some categories.

5.2.5 Willingness to Pay by Car Related Factors

As with the private new car buyers, the size of car purchased seems to be related to average willingness to pay for the safety packages. Small car buyers had average WTP values of $530 and $1381, compared to medium car buyers with $537 and $1338, and large car buyers with $477 and $1252. This data lends further support to the suggestion that differences in willingness to pay may be related to the perceived level safety in large cars compared to smaller cars.

This is again reflected in the make of car purchased, where GMH and Ford drivers of new fleet cars are less willing to pay for both of the safety packages when compared to buyers of other makes. GMH drivers are willing to pay, on average, $467 for the non-air bag package and $1088 for the air bag package. Ford drivers are willing to pay on average, $481 for the non-air bag package and $1383 for the air bag package. As Ford and GMH are the main retailers of large cars, these findings appear to be consistent with those relating to the effect of size of car on average WTP.

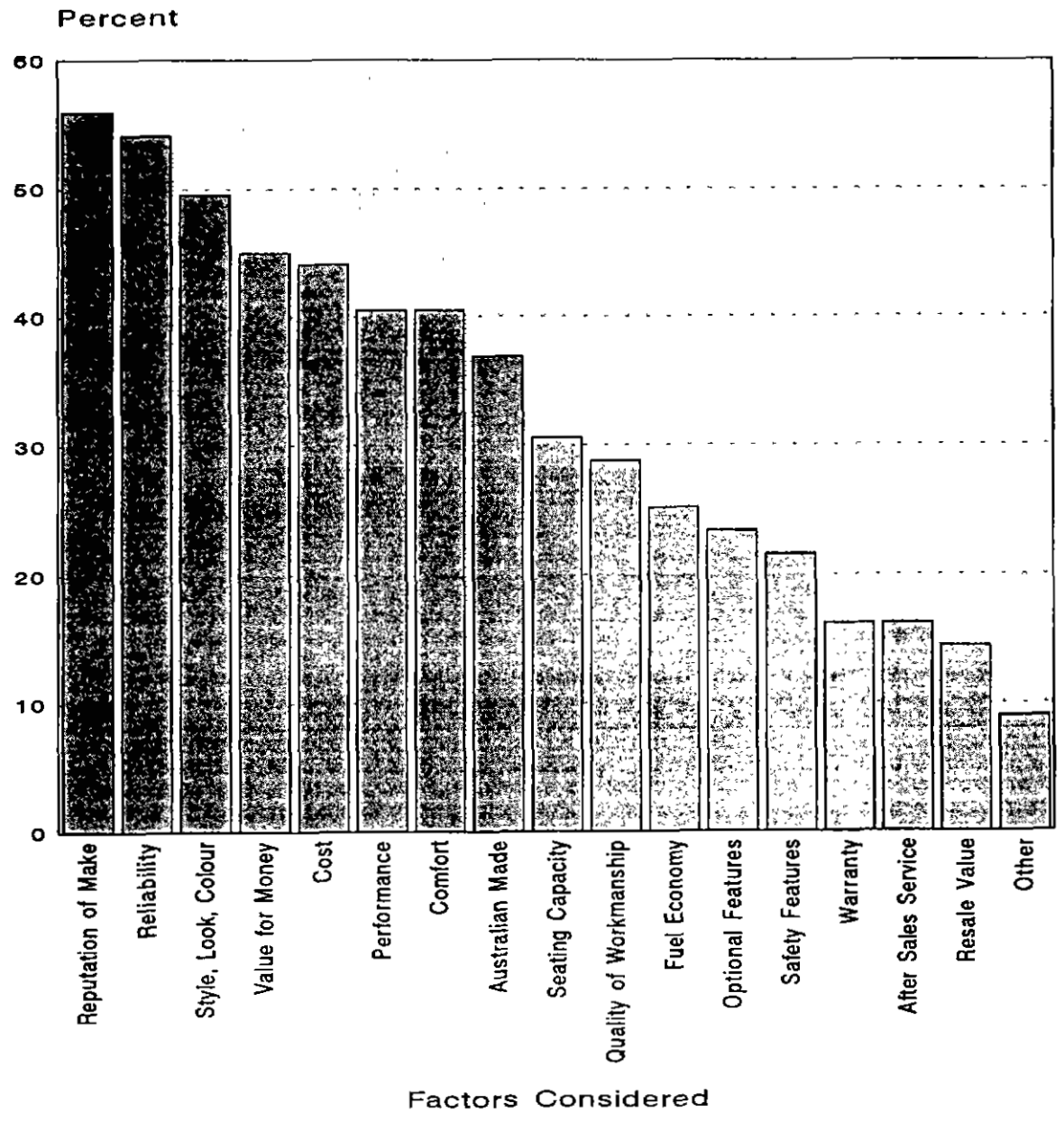
5.2.6 Willingness to Pay by Cost of Car

Like the private new car buyers, it appears that cost of car is not a strong predictor of willingness to pay for safety features in fleet vehicles chosen by the main driver. For example, the average WTP for the non air bag package in cars costing between $20,000 and $24,999 is $526. This is the same as the average WTP value for cars costing between $30,000 and $35,000, and is $63 greater than the average WTP value for cars in the $25,000 to $29,999 category.

5.2.7 All Factors Considered in Choosing Which Car to Buy

Figure 9 displays the percentage of respondents that considered various factors when deciding which car to buy or lease. Reputation of make and model was considered by 56% of drivers when determining which car to buy or lease. This was the most commonly reported factor. Other factors which were frequently considered are reliability (54%), style, look and colour (50%) and value for money (45%). Safety features were reported as being a consideration by 22% of drivers. The frequency with which this factor was considered is ranked thirteenth out of the sixteen factors presented to respondents.

Figure 9: Factors Considered by Private New Car Buyers When Choosing Which Car to Buy



5.2.8 Main Factor Considered in Buying or Leasing the Car

The most reported main factor considered when deciding which car to buy is value for money (14%). This was followed by cost (11%), and reputation of make/model (11%). It is estimated that less than 1% of the main drivers of fleet cars consider safety features as the main factor when choosing which car to buy or lease.

5.2.9 Willingness to Pay by Features Purchased or Leased at Additional Cost

As with the private new car buyers, the main drivers of fleet cars who purchase or lease a car with at least one non-standard feature on their car (at additional cost) were more willing to pay for both the non-air bag and air bag packages. For the non-air bag package, respondents who purchased or lease a car with at least one non-standard feature were willing to pay $533 on average, compared to $463 dollars for those who did not purchase any non-standard features. For the air bag package the average willingness to pay was $1358 for respondents who purchased or leased a car with at least one non-standard feature, compared to $1191 for those who had not.

5.2.10 Additional Features Trade-Off

Of those private new car buyers who purchased features on their car at additional cost, 76% indicated that they would have purchased the non-air bag package at an average WTP value of $553 as well as the additional features. 6% indicated that they would purchase the non-air bag package instead of the additional features at an average WTP value of $525. 15% indicated that they would not purchase the non-air bag package.

When considering the trade off between additional features and the air bag package, 73% of new car buyers who purchased features at additional cost indicated that they would buy both at an average WTP of $1384. 9% indicated that they would buy the air bag package instead of the additional features at and average WTP value of $1350 and 15% indicated that they would not buy the air bag package at all.

5.2.11 Make/Model of Car Trade-Off

When considering the make and model of the car they purchased and the air bag package, 80% of all main drivers of fleet cars indicated that they would pay extra for the safety features, rather than buying a cheaper make or model of car. 10% felt that they would buy a cheaper make and model of car so they could afford the safety features, while 10% indicated that they would not buy the air bag package at all.

A lower proportion of respondents (76%) felt that they would pay extra for the non-air bag package, rather than buying a cheaper make or model of car. 9% felt that they would buy a cheaper make or model in order to afford the features, and 15% felt that they would not buy the non-air bag package at all.

5.3 Sub-study 2

Renters of Short Term Hire Cars

The data for the renters of short term hire cars has not been weighted.

It should be noted that for the purposes of calculating and plotting willingness to pay functions, assumptions were made about the point at which all respondents would not pay for the safety packages (end point). The end point values for all willingness to pay functions were chosen as being highly conservative, and thus reducing the possibility that the average willingness to pay figures are over-estimates of actual willingness to pay.

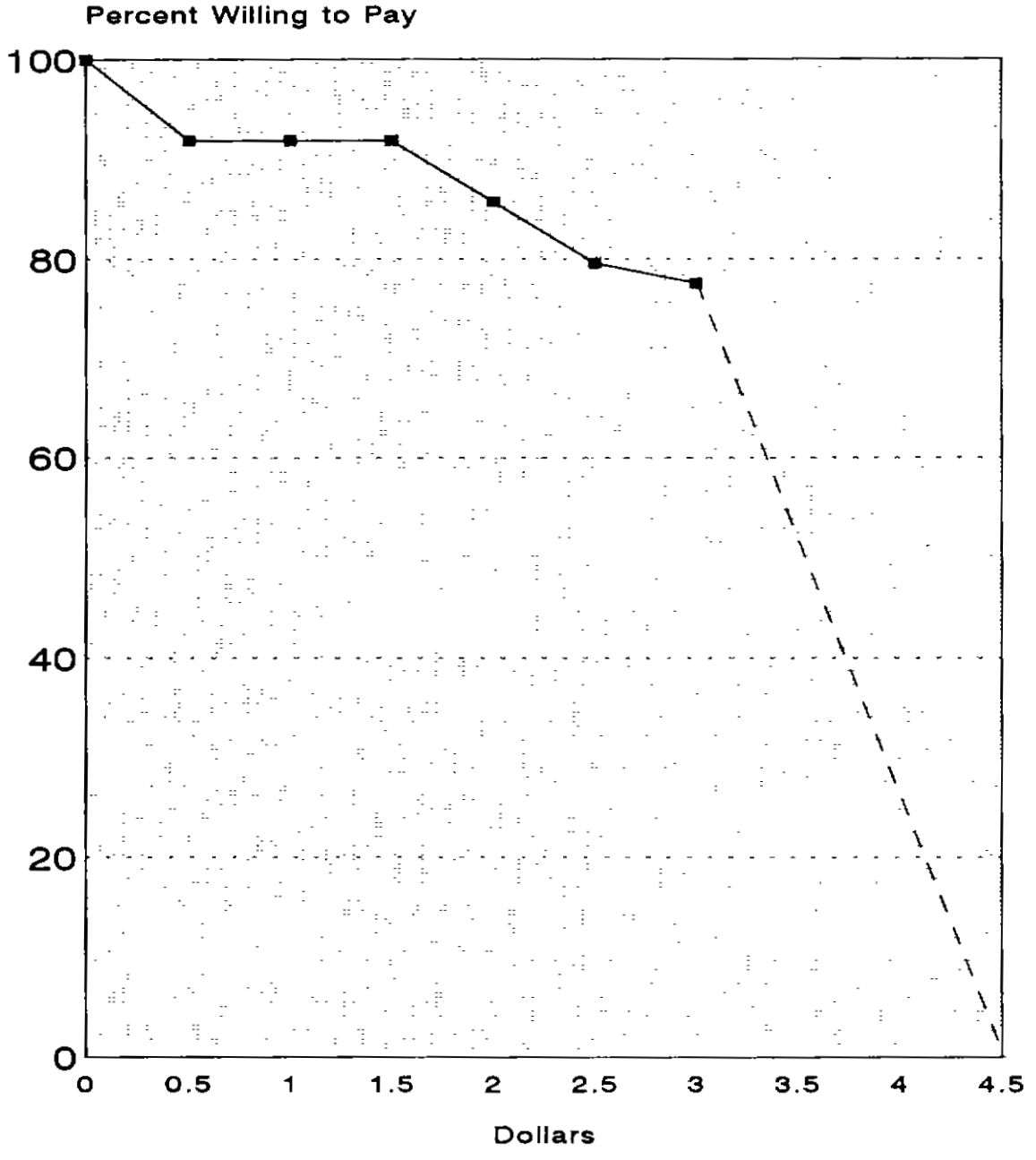
It should also be noted that the findings contained in this section of the report are indicative only. The small sample size prevents rigorous empirical interpretation of the results. Although the findings should be viewed as inherently qualitative, they have been presented so that comparison can be made to the other populations for whom willingness to pay has been determined.

5.3.1 Willingness to Pay for the Non-Air Bag Package

The willingness to pay function for the renters of short term hire cars, with regard to the non-air bag package of safety features is displayed in figure 10. The average willingness to pay for the non-air bag package is calculated to be $3.42 per day. It can be seen from figure 10 that 74% of these renters were willing to pay $3.50 or more per day.

Given a best estimated retail price of $270 for the non-air bag package, the likely increase in rental price is approximately $1 per day. More than 90% of the car renters interviewed were willing to pay $1 or more per day.

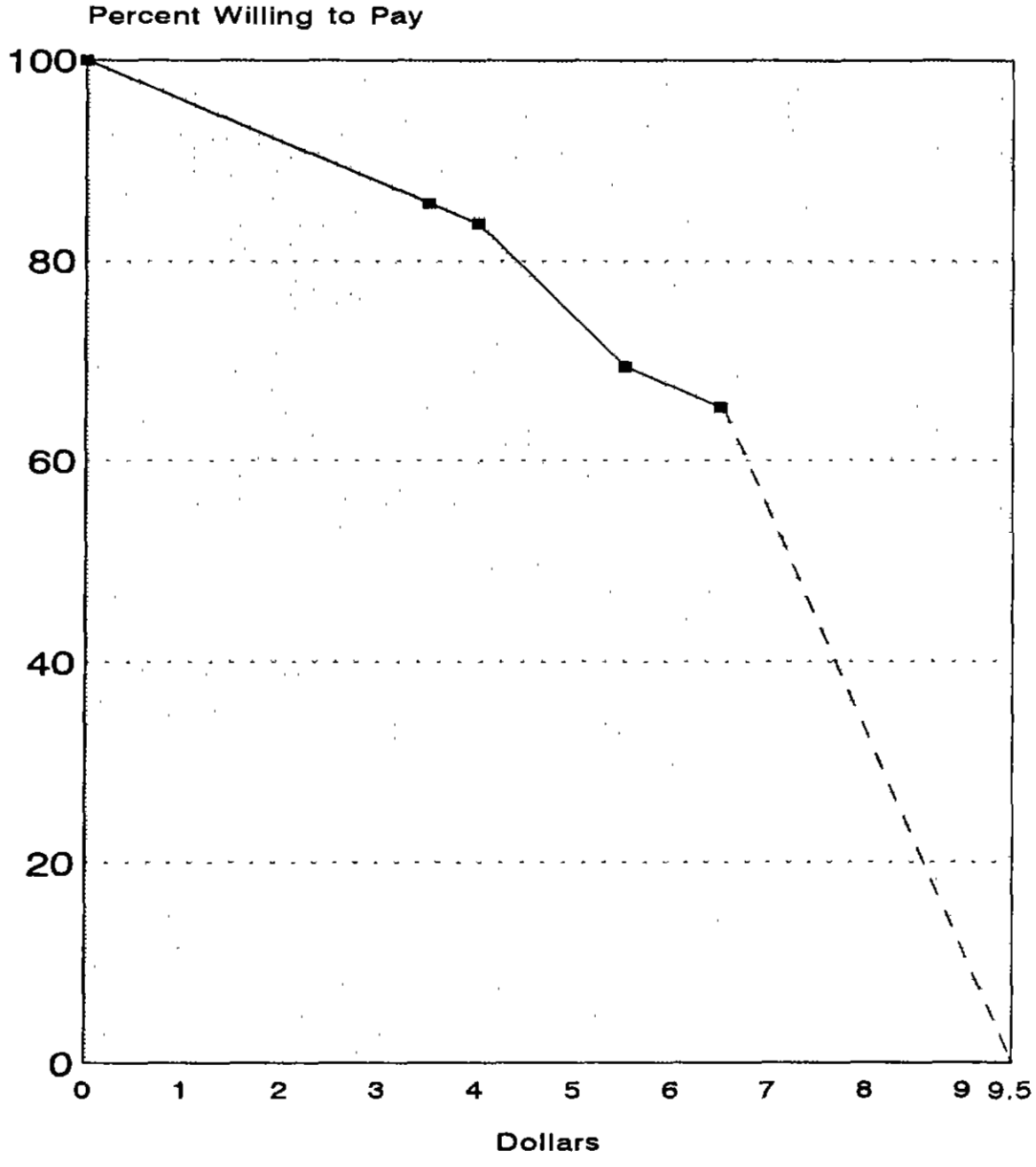
Figure 10: Car Renters Willingness to Pay for Non-air Bag Package



5.3.2 Willingness to Pay for the Air Bag Package

Figure 11 displays the willingness to pay function of short term renters of hire cars for the air bag package. The average willingness to pay value is $6.56 per day, with 63% willing to pay at least $6.50 or more per day. As with the non-air bag package, more than 90% or respondents were willing to pay the expected $2 per day increase in rental fees based on the best estimated retail price of $700 for the air bag package.

Figure 11: Car Renters Willingness to Pay for Non-air Bag Package



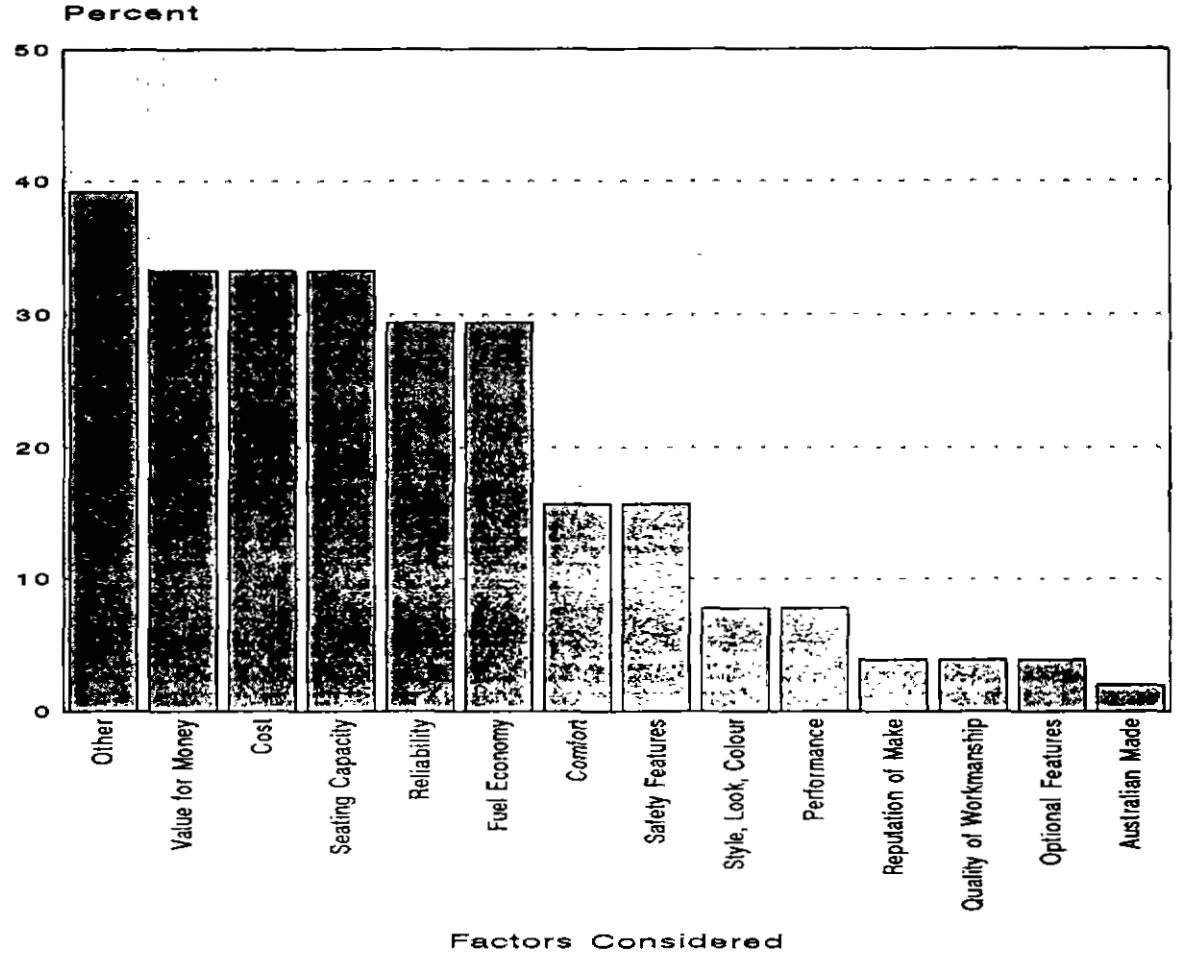
5.3.3 Willingness to Pay by Rental Period

The duration of the rental period may be related to willingness to pay for both the non-air bag and the air bag package. Those people renting cars for only 1 day were willing to pay $3.71 per day for the non-air bag package, compared to people who were renting a car for more than one day, who were prepared to pay $3.24 per day. Similarly for the air bag package, people renting for only one day were prepared to pay $6.97 per day compared to $6.29 per day for those people renting for more than one day.

5.3.4 All Factors Considered in Choosing Which Car to Rent

Figure 12 displays the percentage of respondents that considered various factors when deciding which car to rent. Of the factors presented to the respondents, value for money (33%), rental cost (33%) and seating capacity (33%) were the most frequently considered when choosing which car to rent. Safety features was reported as being a considered by 16% of renters. The frequency with which this factor was considered is ranked seventh out of the thirteen factors presented to respondents.

Figure 12: Factors Considered by Car Renters When Choosing Which Car to Rent



5.3.5 Make/Model of Car Trade-Off

When considering the make and model of the car they rented and the air bag package, 76% of renters indicated that they would pay extra for the safety features, rather than renting a cheaper make or model of car. Their average willingness to pay for of the air bag package is $7.25 per day. 16% felt that they would rent a cheaper make and model of car so they could afford the safety features. Their average willingness to pay for the package is $5.75 per day. 6% indicated that they would not rent a car with the air bag package at all.

A higher proportion of respondents (80%) felt that they would pay extra for the non-air bag package, rather than renting a cheaper make or model of car. 12% felt that they would rent a cheaper make or model in order to afford the features, while 4% felt that they would not rent a car with the non-air bag package at all.

5.3.6 Rental Company Trade-Off

Respondents were asked whether they would rent the same make and model of car with the non-air bag package, at the same daily rate as the car they had just rented, from another rental company. 51% indicated that they would rent a car at the same daily rate with the non-air bag package from another company, and 43% indicated that they would prefer to rent a car without the non-air bag package from the same rental company.

When considering the air bag package, 57% indicated that they would rent a car at the same daily rate with the package from another company, rather than renting a car from the same company but without the air bag package. 39% indicated that they would prefer to rent a car without the air bag package from the same rental company.

5.4 Sub-study 3

Fleet Managers

The data for the fleet managers sub-study has not been weighted.

Again, it should be noted that for the purposes of calculating and plotting willingness to pay functions, assumptions were made about the point at which all respondents would not pay for the safety packages (end point). The end point values for all willingness to pay functions were chosen as being highly conservative, and thus reducing the possibility that the average willingness to pay figures are over-estimates of actual willingness to pay.

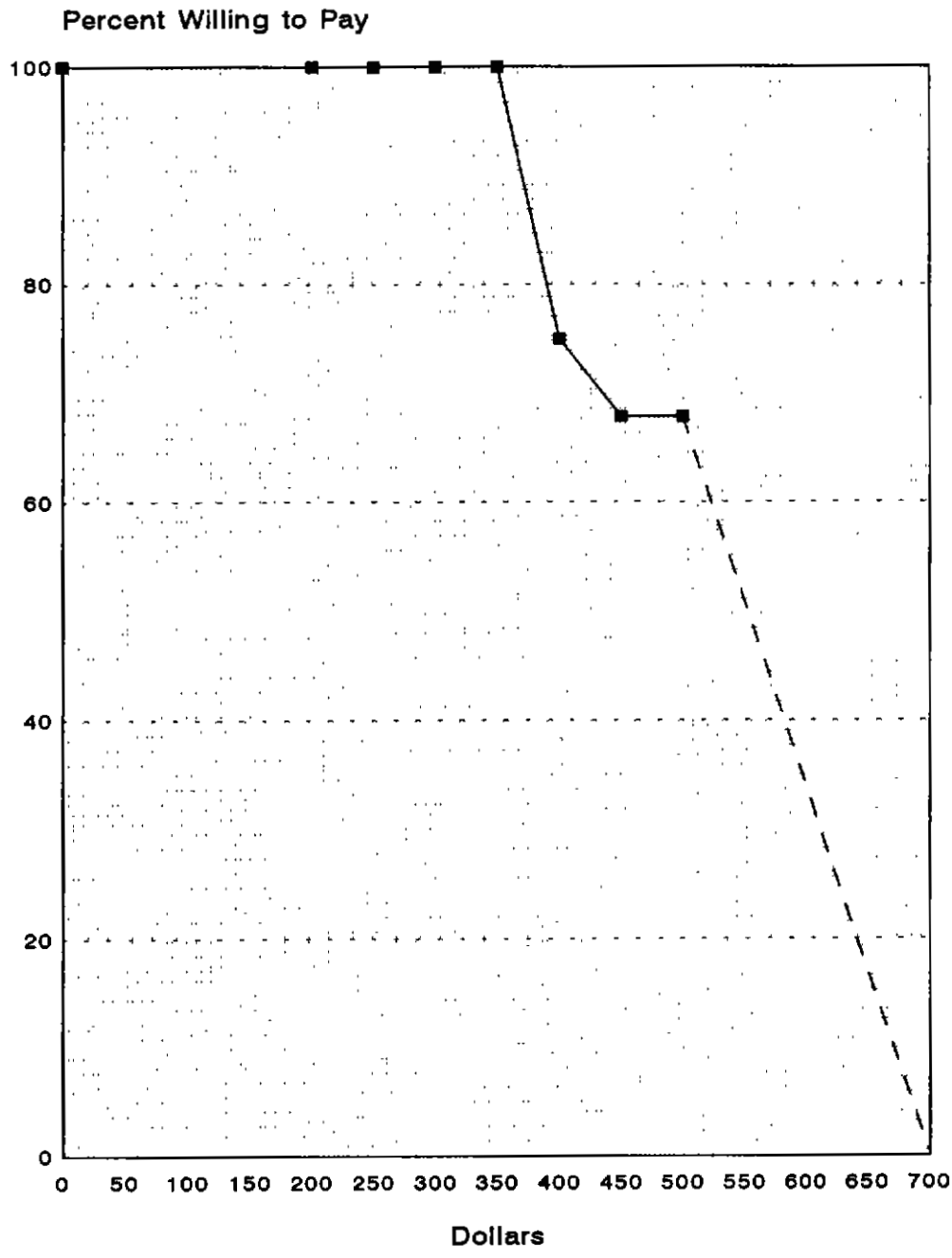
It should also be noted that the findings contained in this section of the report are indicative only. The small sample size prevents rigorous empirical interpretation of the results. Although the findings should be viewed as inherently qualitative, they have been presented so that comparison can be made to the other populations for whom willingness to pay has been determined.

The tables presented for this sub-study show willingness to pay by whether the cars in the fleet were for individuals such as senior executives, or for general use where there is more than one driver who uses the car to meet the every day needs of the organisation. As some fleet managers were responsible for the purchase of both individual cars and general use cars, the two columns in the tables are not mutually exclusive. The Total column reflects the combined willingness to pay for safety features in both general use or individual cars for all fleet managers interviewed.

5.4.1 Willingness to Pay for the Non-Air Bag Package

The combined willingness to pay function for fleet managers, with regard to the non-air bag package of safety features is displayed in figure 13. The average willingness to pay for the non-air bag package is calculated to be $531. It can be seen that over 60% of fleet managers were willing to pay $500 or more per day. All respondents were willing to pay more than the $270 best estimated retail price of the non-air bag package.

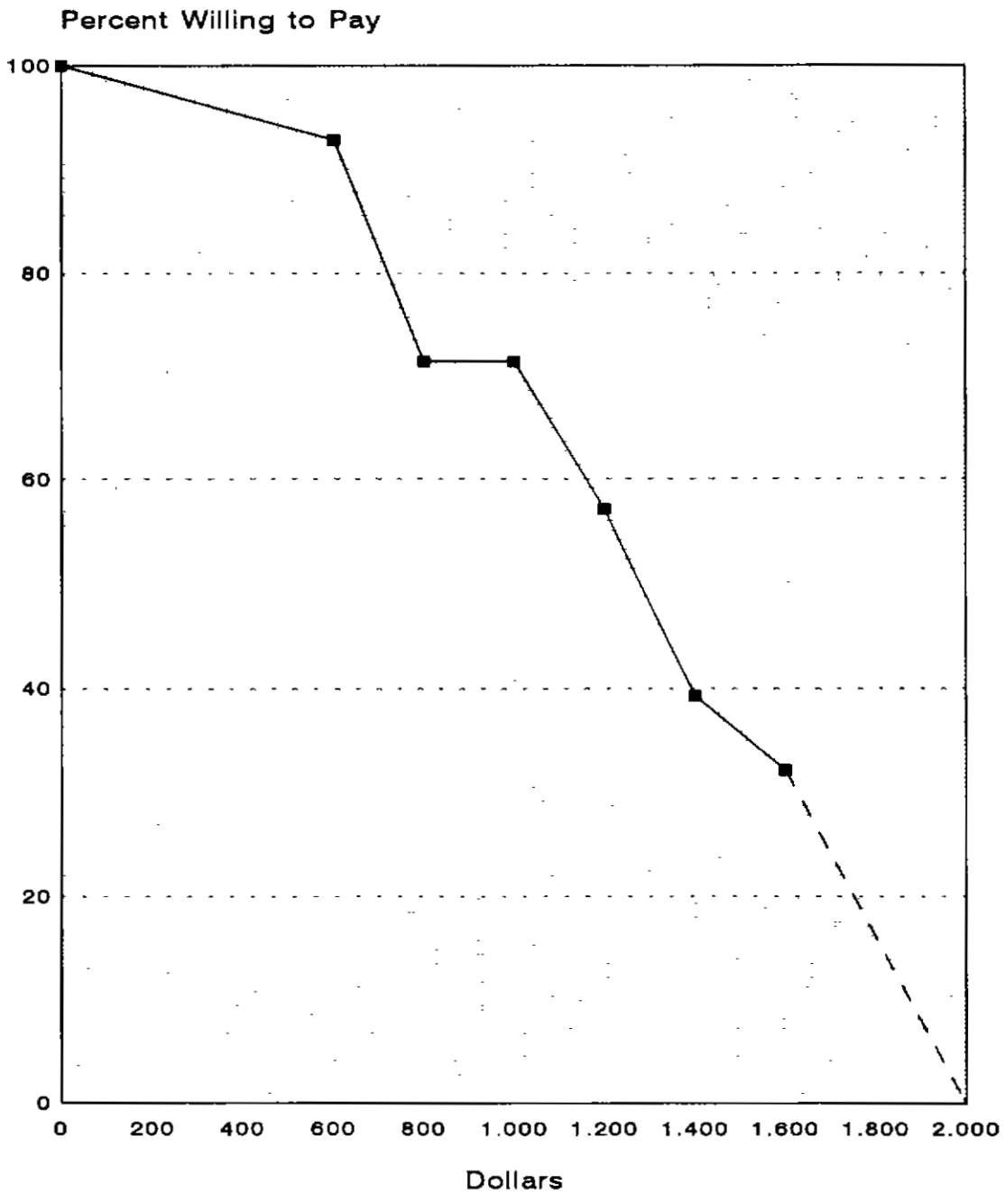
Figure 13: Fleet Managers Willingness to Pay for Non-Air Bag Package in the Cars they Buy



5.4.2 Willingness to Pay for the Air Bag Package

Figure 14 displays the combined willingness to pay function of fleet managers for the air bag package. The average willingness to pay value is $1283 per day, with over 30% willing to pay $1600 or more per day. Over 70% of respondents were willing to pay the $700 best estimated retail price for the air bag package.

Figure 14: Fleet Managers Willingness to Pay for Air Bag Packages in the Cars they Buy



5.4.3 Willingness to Pay by Purpose of Car

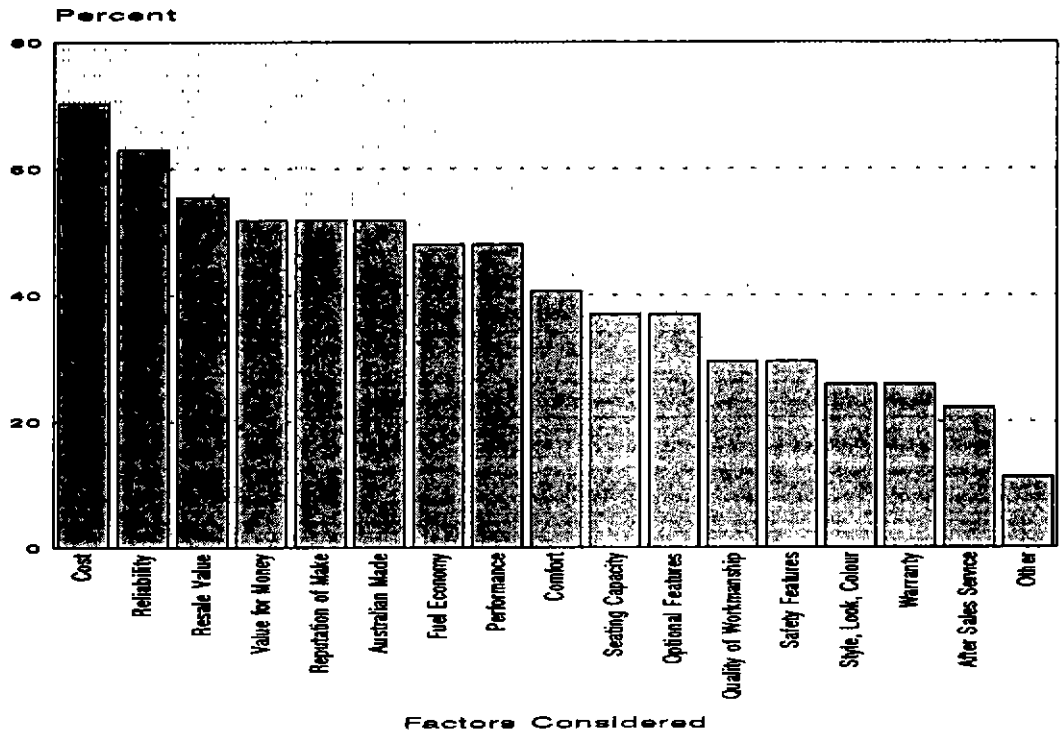
It appears that fleet managers are generally more willing to pay for the air bag and non-air bag package in cars purchased for individual use in comparison to cars purchased for general use. Approximately 73% of fleet managers were willing to pay $500 or more for the non-air bag package in cars purchased for individuals, compared to approximately 56% of fleet managers being willing to pay $500 or more for the non-air bag package in cars purchased for general use. Similarly, the willingness to pay for the air bag package seemed to vary depending upon the purpose of the car. Approximately 39% of fleet managers were willing to pay $1600 or more for the air bag package in cars for individuals, while approximately 31% were willing to pay $1600 or more for the air bag package in cars for general use.

5.4.4 Factors Considered in Which Cars to Purchase or Lease for the Fleet

Figure 15 displays the percentage of fleet managers that considered various factors when deciding which cars to purchase of lease for their fleet. Of the factors presented to the respondents, purchase cost/lease cost (70%), reliability (63%) and resale value (56%) were the most frequently considered when choosing which cars to buy or lease. Safety features was reported as being a considered by 30% of fleet managers. The frequency with which this factor was considered is ranked equal eighth out of the sixteen factors presented to respondents.

Only one fleet manager considered safety features to be the main factor considered when choosing which cars to buy or lease.

Figure 15: Factors Considered by Fleet Managers When Choosing Which Cars to Buy or Lease



6. Conclusion

Overall, it appears fleet buyers are slightly more willing to pay for the safety features than the private new car buyers. This seems to support the suggestion that private buyers would be more sensitive to fluctuations in the purchase price of cars than fleet buyers.

The average willingness to pay values for both the air bag and non-air bag packages was found to be well in excess of the best estimated retail values. This was true for both private new car buyers, the main drivers of fleet cars who choose the car they buy, short term renters of hire cars, and fleet managers.

Appendix 1

Private New Car Buyers and Main Drivers of Fleet Cars Questionnaire

THE ROY MORGAN RESEARCH CENTRE PTY. LTD.
411 Collins Street, Melbourne, 3000. Tel: (03) 629-6888

STRICTLY CONFIDENTIAL
RC-1135 JULY, 1992

VERSION 1

ID NO: ☐☐☐☐

Time finish	am/pm
Time start	am/pm
Total Minutes	

WILLINGNESS TO PAY FOR VEHICLE SAFETY MEASURES

INTRODUCTION

Good morning/afternoon. My name is <SAY NAME> from the Roy Morgan Research Centre, the people who conduct the Morgan Gallup Poll. May I please speak to <SAY RESPONDENT'S NAME>?

→ IF RESPONDENT CHANGES, REPEAT INTRODUCTION AND SAY:

Thank you for agreeing to participate in the survey. The purpose of the survey is to collect information for the Federal Office of Road Safety, about safety features in new motor vehicles.

→ ASK **EVERYONE:**

1a. Firstly, I would like to check that you were the main or joint decision maker in the purchase of a brand new <MAKE> <MODEL> in the last 2 years, that is since July 1990.

YES	1	Ask 1b
NO	2	Terminate - Thank you, but we need to speak to people who have purchased a new car in the last 2 years.

1b. Looking at the top **yellow** card. Please don't look at the other cards yet. Which line best describes in whose **name** that car is **registered**? Just say the number after the line.

NUMBER: .....

PRINT UNLISTED: .....

.....

1c. Looking at the **next pink** card. Which of the following best describes your main reason for purchasing this car? Just say the number after the line.

REPLACE AN OLDER CAR	1
REPLACE A CAR DAMAGED IN AN ACCIDENT	2
BUY FIRST CAR	3
BUY AN ADDITIONAL CAR	4
BUY CAR TO REPLACE OTHER MODE OF TRANSPORT	5
OTHER REASON (Please Specify)	

.....

..... 6

2. Do you mainly use the car for **business** purposes, **personal** purposes or **both**? Please note that driving your car to and from work is not business use.

MAINLY BUSINESS	1
MAINLY PERSONAL	2
BOTH	3

3a. Looking at the **next green** card. Which of those factors did you consider when choosing which car to buy? Which other factors did you consider? Any others?

CIRCLE FOR ALL FACTORS MENTIONED IN COL.1 BELOW ↘

	Col.1:3a		Col.2:3b
AFTER SALES SERVICE	1		1
AUSTRALIAN MADE	2		2
COMFORT	3		3
COST	4		4
FUEL ECONOMY	5		5
OPTIONAL FEATURES	6		6
PERFORMANCE	7		7
QUALITY OF WORKMANSHIP	8		8
RELIABILITY	9		9
REPUTATION OF MAKE/MODEL ...	10		10
RE-SALE VALUE	11	Ask	11
SAFETY FEATURES	12	3b	12
SEATING CAPACITY	13		13
STYLE/LOOK/COLOUR	14		14
VALUE FOR MONEY	15		15
WARRANTY	16		16
OTHER (Please specify)			
.....			
.....	17		17
NONE	18	Toss	
CAN'T SAY	19	to 4a	19

→ IF **MORE THAN ONE** REASON CIRCLED IN **COL 1**, **ASK**:

3b. What was the **most important** factor you considered when deciding to buy the vehicle?
CIRCLE **MOST IMPORTANT** FACTOR IN **COL.2** ABOVE. ↗

→ **ASK EVERYONE:**

4a. Looking at the list of features on the **next blue** card. Which of those features do you have on the car you purchased?
CIRCLE ALL FEATURES MENTIONED IN COL 1.

	Col.1 4a		Col.2 4b
AIR CONDITIONING	1		1
ANTI-LOCK BRAKING (ABS)	2		2
ANTI-THEFT DEVICES/ALARMS	3		3
AUTOMATIC TRANSMISSION	4		4
CENTRAL LOCKING	5		5
CRUISE CONTROL	6		6
LIMITED SLIP DIFFERENTIAL (LSD)	7		7
METALLIC PAINTWORK	8	Ask	8
NON-STANDARD WHEELS & TYRES	9	4b	9
POWER STEERING	10		10
POWER WINDOWS/MIRRORS	11		11
SUNROOF	12		12
OTHER (Please specify)	13		13
NONE OF THESE	14	Toss	14
CAN'T SAY	15	to 5	15

→ **IF ANY FEATURES MENTIONED ON 4a, ASK:**

4b. Which of the features you just mentioned did you purchase at **additional cost**, that is, over and above the standard price of the model you bought?

CIRCLE ALL FEATURES PURCHASED IN COL 2 ABOVE.

→ **ASK <u>EVERYONE</u>:**

5. Were there any safety options available to you to prevent an accident or to protect you in the case of an accident which you **<u>did</u> <u>not</u>** purchase?

YES	1	Ask 6
NO	2	Toss to 8
CAN'T SAY	3	

→ IF <u>YES</u> ON Q5 (ie. code 1 on Q5), ASK:

6. What were those options?

PRINT ALL MENTIONED CAN'T SAY X

.....

.....

---

7. Why did you decide <u>not</u> to purchase those options?
CIRCLE <u>ALL</u> REASONS MENTIONED.

TOO EXPENSIVE	1
UNNECESSARY/NO NEED	2
PREFERRED OTHER OPTIONS ...	3
OTHER (Please Specify)	
.....	4

→READ OUT:

8. The Federal Office of Road Safety has been looking at ways to improve the safety of people in the front seat of cars.

Even in a low speed crash, that is at about 60 km/h, people wearing seat belts can still get injuries to the head, chest and legs from hitting the steering wheel and dash board.

In a 60 km per hour frontal crash, the force of the impact is the same as falling from a four storey building.

Some of the problems that lead to injuries are:

1. moving forward before the seat belt has time to lock up.
2. sliding on the seat and under the seat belt.
3. some people still not wearing seat belts.

These injuries can be reduced by stopping people being thrown too far forward in a crash, by making the areas of the car that people often hit in an accident softer and by encouraging people to wear seat belts at all times.

Looking at the next **pink** card, these features have been developed to make people in the front seats safer.

→CONTINUE TO READ OUT WHILE RESPONDENT IS LOOKING AT THE CARD.

Improved Seat Belt Systems

Seat belts can be made better at stopping people from being thrown forward in a crash. This can be done by making the seat belt lock up faster and tighter when a crash occurs, and by making them fit better (such as by putting the mountings on the seat frame).

Improved Seat Design

The seats in cars can be made better by stopping people from sliding under the seat belt. This can be done by improving the base of the seat and by putting more padding in the seat.

Improved Leg Protection

Injuries to peoples' legs and lower bodies can be reduced by padding the lower area of the dash board in front of a person's knees.

Padded Steering Wheels

Car drivers often get hurt in a crash by hitting the steering wheel, even when they are wearing seat belts. The driver can be made safer by using a softer and better made steering wheel.

A Seatbelt Warning Device

A number of people are still being hurt in a crash because they do not wear a seat belt. People can be encouraged to wear a seat belt by using a seat belt warning alarm. This alarm lets the driver and others know when someone has forgotten to put on their seatbelt.

Summary

These options are better at improving people's safety when they're all put into a car at the same time. If only one or two of these options are used they would not be as good as if all the options were used.

Extensive research conducted by the Federal Office of Road Safety has shown that in cars with those safety features, occupant injuries and fatalities would be reduced by up to 17%.

Please take a moment to read the **next white** card. On it you will see a picture of a car fitted with the safety features we just talked about.

The safety features marked in different colours on the card are:

1. Improvements to seat design - Shown in GREEN
2. Improvements to existing seat belt systems - Shown in DARK BLUE
3. Improved leg protection - Shown in PURPLE
4. Padded steering wheels - Shown in YELLOW
5. Seat belt warning devices - Shown in LIGHT BLUE

8a. Would you be willing to pay (or have built into your total lease payments) an **additional $300** to have those safety features provided in a new car?

YES ..... 1 Ask 9a
NO ..... 2 Toss to 10a

→ IF YES ON 8a, ASK:

9a. Would you pay **$500** for those safety features?

YES ..... 1 Toss to 11
NO ..... 2 Ask 9b

→ IF NO ON 9a, ASK:

9b. Would you pay **$400** for those safety features?

YES ..... 1 Ask 9c
NO ..... 2 Go to 9d

→ IF YES ON 9b, ASK:

9c. Would you pay **$450** for those safety features?

YES ..... 1 } Toss to 11
NO ..... 2 }

→ IF NO ON 9b, ASK:

9d. Would you pay **$350** for those safety features?

YES ..... 1 } Toss to 11
NO ..... 2 }

OFFICE USE ①

→ IF NO ON 8a, ASK:

10a. Would you pay **$200** for those safety features?

YES	1	Ask 10b
NO	2	Go to 11

→ IF YES ON 10a, ASK:

10b. Would you pay **$250** for those safety features?

YES	1	Ask
NO	2	11

→ IF PURCHASED ANY FEATURES AT ADDITIONAL COST
(ie. Codes 1-13 on 4b), ASK:
(Otherwise go to Q12)

11. If those safety features had been available to you when you chose your car, would you have bought them for this car **as well as** the features you purchased at additional cost, bought them for this car **instead of** some or all of the features you purchased at additional cost, or **not bought** them for this car?

BOUGHT AS WELL AS EXTRA FEATURES	1
BOUGHT INSTEAD OF EXTRA FEATURES ...	2
NOT BOUGHT	3
CAN'T SAY	4

→ ASK **EVERYONE**:

12. If those safety features had been available to you when you chose your car, would you have bought the **same** make and model and paid extra for the safety features, bought a **cheaper** make or model of car in order to buy the safety features, or **not bought** the safety features for this car?

BOUGHT SAME CAR AND PAID EXTRA	1
BOUGHT CHEAPER CAR	2
NOT BOUGHT	3
CAN'T SAY	4

→READ OUT:

13. The next **pink** card describes a driver airbag.

Driver Airbag

Car drivers often get badly hurt in a crash because they hit the steering wheel and dash board. Injuries to the head, chest and stomach can be reduced by having an Air Bag fitted to the steering wheel. In a crash the Air Bag pops out of the steering wheel and inflates stopping the driver from hitting the steering wheel and dash board and then deflates immediately. An Air Bag works best when a driver is also wearing a seat belt.

Looking at the next **white** card, these pictures show how an Air Bag works.

Research has shown that in cars with a Driver Airbag **and** the other safety features mentioned earlier, occupant injuries & fatalities would be reduced by up to 25%.

Please take a moment to read the **next white** card. On it you will see a picture of the same safety features shown earlier, with the addition of a driver air bag (shown in red) in the steering wheel.

13a. Would you be willing to pay (or have built into your total lease payments) an **additional $800** to have all of these safety features provided in a new car?

YES ..... 1 Ask 14a
NO ..... 2 Toss to 15

→ IF **YES** ON 13a, ASK:

14a. Would you pay **$1600** for all of these safety features?

YES ..... 1 Toss to 16
NO ..... 2 Ask 14b

→ IF **NO** ON 14a, ASK:

14b. Would you pay **$1200** for all of these safety features?

YES ..... 1 Ask 14c
NO ..... 2 Go to 14d

→ IF **YES** ON 14b, ASK:

14c. Would you pay **$1400** for all of these safety features?

YES ..... 1 } Toss to 16
NO ..... 2 }

→ IF **NO** ON 14b, ASK:

14d. Would you pay **$1000** for all of these safety features?

YES ..... 1 } Toss to 16
NO ..... 2 }

→ IF NO ON 13a, ASK:

15. Would you pay $600 for all of these safety features?

YES ..... 1 } Ask 16
NO 2

→ IF PURCHASED ANY FEATURES AT ADDITIONAL COST (ie. Codes 1-13 on 4b), ASK: (Otherwise go to Q17)

16. If those safety features had been available to you when you chose your car, would you have bought them for this car as well as the features you purchased at additional cost, bought them for this car instead of some or all of the features you purchased at additional cost, or not bought them for this car?

BOUGHT AS WELL AS EXTRA FEATURES 1
BOUGHT INSTEAD OF EXTRA FEATURES ... 2
NOT BOUGHT 3
CAN'T SAY 4

→ ASK EVERYONE:

17. If those safety features had been available to you when you chose your car, would you have bought the same make and model and paid extra for the safety features, bought a cheaper make or model of car in order to buy the safety features, or not bought the safety features for this car?

BOUGHT SAME CAR AND PAID EXTRA 1
BOUGHT CHEAPER CAR 2
NOT BOUGHT 3
CAN'T SAY 4

→ ASK **EVERYONE**:

18a. To make sure we have a true **cross-section** of people, would you mind telling me your **approximate** age?

14-15	1	25-29 ...	5	45-49 ...	9		
16-17	2	30-34 ...	6	50-54 ..	10	65-69	13
18-19	3	35-39 ...	7	55-59 ..	11	70+	14
20-24	4	40-44 ...	8	60-64 ..	12		

→ ALWAYS **RECORD**:

18b. RESPONDENT'S **SEX**

MALE 1
FEMALE 2

18c. Are you married, separated, divorced, widowed, de facto, engaged, planning to marry, or single?

MARRIED	1	WIDOWED	4
SEPARATED	2	DEFACTO	5
DIVORCED	3	SINGLE	6

18d. Turning to the **green** card for **education**. (PAUSE) Would you please say the **number** alongside the **highest** level of education you've reached?

NUMBER: .....

18e. Are you now in **paid** employment?
IF **YES: Full-time** for 35 hours or more a week or **part**-time?

YES { FULL-TIME .. 1 } Go to
YES { PART-TIME .. 2 } 18g
NO ..... P Ask 18f

18f. IF **NO:** Are you **now looking** for a paid job?

IF **LOOKING:**
A **full**-time job - for 35 hours a week - or **part**-time job?

FULL-TIME ..... 5 } Toss to
PART-TIME ..... 6 } 18i

IF **NOT** LOOKING:
Are you (READ ANSWER-PLACES)

Retired? ..... 7 }
A student? ..... 8 } Toss
A non-worker .. 4 } to
or Home duties? .. 3 } 18i

18g. And may I have your **occupation** please - your position and industry?
PRINT ANSWERS.

POSITION: .....

INDUSTRY: .....

18h. Is that in the **public** service - in **private** industry - or **self-employed**?

PUBLIC SERVICE 1
PRIVATE INDUSTRY 2
SELF-EMPLOYED 3

→ ASK EVERYONE:

18i. Looking again at the **blue** card. (PAUSE)
Would you please say the **letter** at the end of the line, that includes the **households total** present approximate **weekly** or **annual** income from **all** sources **before** tax - please? include **all** wages, salaries, pensions and any other income.
IF **CAN'T SAY**: Well, your best guess?

C	....	7	P	....	4
E	....	8	Q	....	5
G	....	9	R	....	6
I	.....	0	S	....	1
J	....	V	T	....	2
K	....	1	U	....	3
L	....	2	V	....	4
M	....	3	W	....	5
NO ANSWER	.....				X

19a. How many children **under 16**, live here in your household?

HOW MANY:		Ask 19b
NONE	0	Go to 20a

→ IF 1 **OR MORE** CHILDREN, ASK:

19b. Are you the parent or guardian of (any of those children) (that child)?

YES	1
NO	2

→ ASK EVERYONE:

20a. Looking at the next **yellow** card. Would you please say how much your <MAKE> <MODEL> cost all up, that is including any optional features you purchased at additional cost. Please say the number at the end of the line.

$12,000 - $14,999	1
$15,000 - $19,999	2
$20,000 - $24,999	3
$25,000 - $29,999	4
$30,000 - $35,000	5
NO ANSWER	6

20b. Were you the main decision maker, or a joint decision maker that decided which car to buy?

MAIN DECISION MAKER	1	Go to 20e
JOINT DECISION MAKER	2	Ask 20c

→ IF **JOINT** DECISION MAKER, RECORD:

20c. How many people contributed while you were conducting the interview?

1 PERSON (RESPONDENT)	1	Go to 20e
2 OR MORE PEOPLE	2	Ask 20d

→ IF **2 OR MORE** PEOPLE CONTRIBUTED, ASK OR RECORD:

20d. (Was the other person)(Were any of the other people) who contributed during the interview a joint decision maker that decided which car to buy, or not?

YES, ANOTHER JOINT DECISION MAKER HERE	1
NO, NOT	2

20e. Interviewer to sign for a true and correct interview

..... ___/___/92

Appendix 2

Car Renters Questionnaire

THE ROY MORGAN RESEARCH CENTRE PTY. LTD.
411 Collins Street, Melbourne, 3000. Tel: (03) 629-6888

STRICTLY CONFIDENTIAL
RC-1135B AUGUST, 1992

VERSION 1

Time finish	am/pm
Time start	am/pm
Total Minutes	

FEDERAL OFFICE OF ROAD SAFETY

CAR RENTERS QUESTIONNAIRE

A. Name of rental company where interviewed/used by respondent.

AVIS 1
THRIFTY 2
HERTZ 3

B. State:

VIC 1
NSW 2

INTRODUCTION

Good morning/afternoon. My name is <SAY NAME> from the Roy Morgan Research Centre, the people who conduct the Morgan Gallup Poll. We are conducting a survey for the Federal Office of Road Safety on people who rent passenger vehicles.

→ ASK **EVERYONE:**

1a. Firstly, have you just rented a car, or are you returning a rented car?

YES, JUST RENTED ..... 1 } Ask 1b
YES, RETURNING CAR ..... 2 }
NO ..... 3 Terminate - Thank you, but we need to speak to people who have just rented a car.

1b. What make and model of car did you rent?

HOLDEN BARINA	1	MITSUBISHI MAGNA	14
HOLDEN NOVA	2	MITSUBISHI GALANT	15
HOLDEN APOLLO	3	MITSUBISHI VERADA	16
HOLDEN COMMODORE	4	TOYOTA COROLLA	17
HOLDEN CALAIS	5	TOYOTA CAMRY	18
FORD FESTIVA	6	TOYOTA LEXCEN	19
FORD LASER	7	TOYOTA TARAGO	20
FORD CAPRI	8	NISSAN PULSAR	21
FORD CORSAIR	9	NISSAN PINTARA	22
FORD TELSTAR	10	OTHER (Specify)	
FORD FALCON	11		
FORD FAIRMONT	12		23 Terminate
MITSUBISHI LANCER	13	DON'T KNOW	24

IF OTHER (Code 23) OR DON'T KNOW (Code 24), TERMINATE - "Thank you, but we need to speak to people who have rented certain types of cars".

2. For how long (did) (will) you rent the car?

1 DAY	1
2 DAYS TO 7 DAYS	2
8 DAYS OR MORE	3

3a. (Did) (Will) you use the car for business purposes, personal purposes or both?

MAINLY BUSINESS	1
MAINLY PERSONAL	2
BOTH	3

3b. Do you or your employer have an arrangement with (SAY RENTAL COMPANY) whereby you rent cars only from (SAY RENTAL COMPANY) or do you rent cars from any company?

ARRANGEMENT WITH ONE COMPANY	1
RENT FROM ANY COMPANY	2
CAN'T SAY	3

4a. Looking at the first **green** card, (please don't look at the other cards yet). Which of those factors did you consider when choosing which type of car to rent? Were there any other factors you considered? Any others?
CIRCLE **ALL** FEATURES MENTIONED IN **COL.1**.

	Col.1:4a		Col.2:4b
AUSTRALIAN MADE	1		1
COMFORT	2		2
COST/RENTAL FEES	3		3
FUEL ECONOMY	4		4
OPTIONAL FEATURES	5		5
PERFORMANCE	6		6
QUALITY OF WORKMANSHIP	7		7
RELIABILITY	8		8
REPUTATION OF MAKE/MODEL	9		9
SAFETY FEATURES	10	Ask	10
SEATING CAPACITY	11	4b	11
STYLE/LOOK/COLOUR	12		12
VALUE FOR MONEY	13		13
OTHER (Please specify)			
.....			
.....	14		14
NONE	15	Toss	
CAN'T SAY	16	to 5a	16

→ IF **MORE THAN ONE** REASON CIRCLED IN **COL 1**, **ASK**:

4b. What was the **most important** factor you considered when deciding to rent a car?

CIRCLE **MOST IMPORTANT** FACTOR IN **COL.2** ABOVE.

→READ OUT:

5. The Federal Office of Road Safety has been looking at ways to improve the safety of people in the front seat of cars.

Even in a low speed crash, that is at about 60 km/h, people wearing seat belts can still get injuries to the head, chest and legs from hitting the steering wheel and dash board.

In a 60 km per hour frontal crash, the force of the impact is the same as falling from a four storey building.

Some of the problems that lead to injuries are:

1. moving forward before the seat belt has time to lock up.
2. sliding on the seat and under the seat belt.
3. some people still not wearing seat belts.

These injuries can be reduced by stopping people being thrown too far forward in a crash, by making the areas of the car that people often hit in an accident softer and by encouraging people to wear seat belts at all times.

Looking at the next pink card, these features have been developed to make people in the front seats safer.

→CONTINUE TO READ OUT WHILE RESPONDENT IS LOOKING AT THE CARD.

Improved Seat Belt Systems

Seat belts can be made better at stopping people from being thrown forward in a crash. This can be done by making the seat belt lock up faster and tighter when a crash occurs, and by making them fit better (such as by putting the mountings on the seat frame).

Improved Seat Design

The seats in cars can be made better by stopping people from sliding under the seat belt. This can be done by improving the base of the seat and by putting more padding in the seat.

Improved Leg Protection

Injuries to peoples' legs and lower bodies can be reduced by padding the lower area of the dash board in front of a person's knees.

Padded Steering Wheels

Car drivers often get hurt in a crash by hitting the steering wheel, even when they are wearing seat belts. The driver can be made safer by using a softer and better made steering wheel.

A Seatbelt Warning Device

A number of people are still being hurt in a crash because they do not wear a seat belt. People can be encouraged to wear a seat belt by using a seat belt warning alarm. This alarm lets the driver and others know when someone has forgotten to put on their seatbelt.

Summary

These options are better at improving people's safety when they're all put into a car at the same time. If only one or two of these options are used they would not be as good as if all the options were used.

Extensive research conducted by the Federal Office of Road Safety has shown that in cars with those safety features, occupant injuries and fatalities would be reduced by up to 17%.

Please take a moment to read the **next white** card. On it you will see a picture of a car fitted with the safety features we just talked about.

The safety features marked in different colours on the card are:

1. Improvements to seat design - Shown in GREEN
2. Improvements to existing seat belt systems - Shown in DARK BLUE
3. Improved leg protection - Shown in PURPLE
4. Padded steering wheels - Shown in YELLOW
5. Seat belt warning devices - Shown in LIGHT BLUE

5a. Would you be willing to pay an additional cost of $2.00 per day to have these safety features provided in a rented car?

YES ..... 1 Ask 5b
NO ..... 2 Toss to 6a

→ IF YES ON 5a, ASK:

5b. Would you be willing to pay an additional cost of $3.50 per day to have these safety features provided in a rented car?

YES ..... 1 Toss to 7a
NO ..... 2 Ask 5c

→ IF NO ON 5b, ASK:

5c. Would you be willing to pay an additional cost of $2.50 per day to have these safety features provided in a rented car?

YES ..... 1 Ask 5d
NO ..... 2 Toss to 7a

→ IF YES ON 5c, ASK:

5d. Would you be willing to pay an additional cost of $3.00 per day to have these safety features provided in a rented car?

YES ..... 1 } Toss
NO ..... 2 } to 7a

OFFICE USE ①

→ IF NO ON 5a, ASK:

6a. Would you be willing to pay an additional cost of 50 cents per day to have these safety features provided in a rented car?

YES	1	Ask 6b
NO	2	Go to 7a

→ IF YES ON 6a, ASK:

6b. Would you be willing to pay an additional cost of $1.50 per day to have these safety features provided in a rented car?

YES	1	Go to 7a
NO	2	Ask 6c

→ IF NO ON 6b, ASK:

6c. Would you be willing to pay an additional cost of $1 per day to have these safety features provided in a rented car?

YES	1	Ask 7a
NO	2	

→ ASK EVERYONE:

7a. If those safety features had been available (when you rented this car) (on the car you're going to rent) would you have rented the **same make** and **model** of car and **paid extra** for the safety features, rented a **cheaper make** and **model** in order to rent a car **with these safety features** or **not** rented a car with safety features?

RENTED SAME CAR AND PAID EXTRA	1
RENTED CHEAPER CAR WITH SAFETY FEATURES	2
NOT RENTED CAR WITH SAFETY FEATURES	3
CAN'T SAY	4

7b. If another rental company offered the same make and model of car with these safety features, at the same daily rate as the car you've just rented without these safety features, that is without any additional cost, would you rent this type of car from another rental company?

YES	1
NO	2
CAN'T SAY	3

→READ OUT:

8. The next **pink** card describes a driver airbag.

Driver Airbag

Car drivers often get badly hurt in a crash because they hit the steering wheel and dash board. Injuries to the head, chest and stomach can be reduced by having an Air Bag fitted to the steering wheel. In a crash the Air Bag pops out of the steering wheel and inflates stopping the driver from hitting the steering wheel and dash board and then deflates immediately. An Air Bag works best when a driver is also wearing a seat belt.

Looking at the next **white** card, these pictures show how an Air Bag works.

Research has shown that in cars with a Driver Airbag **and** the other safety features mentioned earlier, occupant injuries & fatalities would be reduced by up to 25%.

Please take a moment to read the **next white** card. On it you will see a picture of the same safety features shown earlier, with the addition of a driver air bag (shown in red) in the steering wheel.

8a. Would you be willing to pay an additional cost of $5.00 per day to have these safety features provided in a rented car?

YES ..... 1 Ask 8b
NO ..... 2 Toss to 9a

→ IF **YES** ON 8a, ASK:

8b. Would you be willing to pay an additional cost of $6.50 per day to have these safety features provided in a rented car?

YES ..... 1 Toss to 10a
NO ..... 2 Ask 8c

→ IF **NO** ON 8b, ASK:

8c. Would you be willing to pay an additional cost of $5.50 per day to have these safety features provided in a rented car?

YES ..... 1 Ask 8d
NO ..... 2 Toss to 10a

→ IF **YES** ON 8c, ASK:

8d. Would you be willing to pay an additional cost of $6.00 per day to have these safety features provided in a rented car?

YES ..... 1 } Toss to
NO ..... 2 } 10a

OFFICE USE ①

→ IF NO ON 8a, ASK:

9a. Would you be willing to pay an additional cost of $3.50 per day to have these safety features provided in a rented car?

YES	1	Ask 9b
NO	2	Go to 10a

→ IF YES ON 9a, ASK:

9b. Would you be willing to pay an additional cost of $4.50 per day to have these safety features provided in a rented car?

YES	1	Go to 10a
NO	2	Ask 9c

→ IF NO ON 9b, ASK:

9c. Would you be willing to pay an additional cost of $4.00 per day to have these safety features provided in a rented car?

YES	1	Ask 10a
NO	2	

→ ASK EVERYONE:

10a. If those safety features had been available (when you rented this car) (on the car you're going to rent) would you have rented the same make and model of car and paid extra for the safety features, rented a cheaper make and model in order to rent a car with these safety features or not rented a car with safety features?

RENTED SAME CAR AND PAID EXTRA	1
RENTED CHEAPER CAR WITH SAFETY FEATURES	2
NOT RENTED CAR WITH SAFETY FEATURES	3
CAN'T SAY	4

10b. If another rental company offered the same make and model of car with these safety features, at the same daily rate as the car you've just rented without these safety features, that is without any additional cost, would you rent this type of car from another rental company?

YES	1
NO	2
CAN'T SAY	3

OFFICE USE ①

→ ASK **EVERYONE**:

18a. To make sure we have a true **cross-section** of people, would you mind telling me your **approximate** age?

14-15	1	25-29 ...	5	45-49 ...	9		
16-17	2	30-34 ...	6	50-54 ..	10	65-69	13
18-19	3	35-39 ...	7	55-59 ..	11	70+	14
20-24	4	40-44 ...	8	60-64 ..	12		

→ ALWAYS **RECORD**:

18b. RESPONDENT'S **SEX**

MALE 1
FEMALE 2

18c. Are you married, separated, divorced, widowed, de facto, or single?

MARRIED	1	WIDOWED	4
SEPARATED	2	DEFACTO	5
DIVORCED	3	SINGLE	6

18d. Turning to the **green** card for **education**. (PAUSE) Would you please say the **number** alongside the **highest** level of education you've reached?

NUMBER: .....

18e. Are you now in **paid** employment?
IF **YES: Full-time** for 35 hours or more a week or **part**-time?

YES { FULL-TIME .. 1 } Go to
YES { PART-TIME .. 2 } 18f
NO ..... P Ask 18h

18f. And may I have your **occupation** please - your position and industry?
PRINT ANSWERS.

POSITION: .....

INDUSTRY: .....

18g. Is that in the **public** service - in **private** industry - or **self-employed**?

PUBLIC SERVICE 1
PRIVATE INDUSTRY 2
SELF-EMPLOYED 3

→ ASK **EVERYONE**:

18h. Looking at the **blue** card. (PAUSE) Would you please say the **letter** at the end of the line, that includes **your own** present approximate **weekly** or **annual** income from **all** sources **before** tax?

IF **CAN'T SAY**: Well, your best guess?

C	7	P	4
E	8	Q	5
G	9	R	6
I	0	S	1
J	V	T	2
K	1	U	3
L	2	V	4
M	3	W	5
NO ANSWER			X

19a. Were you the main decision maker, or a joint decision maker that decided which car to rent or not?

MAIN DECISION MAKER	1	Go to 19e
JOINT DECISION MAKER	2	Ask 19b
NO, NOT	3	Go to 19e

→ IF JOINT DECISION MAKER:

19b. Who was the other decision maker?

SPOUSE/PARTNER	1
EMPLOYER	2
BUSINESS COLLEAGUE/ASSOCIATE	3
FRIEND/RELATIVE	4
OTHER (Specify)	
.....	5

→ IF JOINT DECISION MAKER, INTERVIEWER TO RECORD:

19c. How many people contributed while you were conducting the interview?

1 PERSON (RESPONDENT)	1	Go to 19e
2 OR MORE PEOPLE	2	Ask 19d

→ IF 2 OR MORE PEOPLE CONTRIBUTED, ASK OR RECORD:

19d. (Was the other person)(Were any of the other people) who contributed during the interview a joint decision maker that decided which car to rent, or not?

YES, ANOTHER JOINT DECISION MAKER HERE	1
NO, NOT	2

19e. Interviewer to sign for a true and correct interview

..... ___/___/92

Appendix 3

Fleet Managers Questionnaire

THE ROY MORGAN RESEARCH CENTRE PTY. LTD.
411 Collins Street, Melbourne, 3000. Tel: (03) 629-6888

STRICTLY CONFIDENTIAL
RC-1135C SEPTEMBER, 1992

VERSION 1

Time finish	am/pm
Time start	am/pm
Total Minutes	

ID NO:

FEDERAL OFFICE OF ROAD SAFETY FLEET MANAGERS

INTRODUCTION

Good morning/afternoon. My name is <SAY NAME> from the Roy Morgan Research Centre, the people who conduct the Morgan Gallup Poll. We are conducting a survey for the Federal Office of Road Safety on managers who purchase or lease passenger vehicles for fleets. The survey is part of a project to examine how fleet managers decide which types of passenger vehicles they purchase or lease for their fleet, and their willingness to pay for safety features in those vehicles.

→ASK **EVERYONE:**

A. First, I'd just like to check a few details.

Has your organisation purchased or leased any **brand new** passenger vehicles for the use of a particular **individual** in the last 2 years, that is since September 1990, or not?

YES	1	Ask B
NO, NOT	2	Go to
CAN'T SAY	3	C

→IF **YES** ON A, ASK:

B. Were you the main decision maker that decided which types of cars to purchase or lease, or not?

YES	1
NO, NOT	2
CAN'T SAY	3

→ASK **EVERYONE:**

C. Has your organisation purchased or leased any **brand new** passenger vehicles for **general use** in the last 2 years since September 1990, that is, cars which are usually driven by more than one person in the organisation, or not?

YES	1	Ask D
NO, NOT	2	Go to
CAN'T SAY	3	E

→IF **YES** ON C, ASK:

D. Were you the main decision maker that decided which types of cars to purchase or lease or not?

YES	1
NO, NOT	2
CAN'T SAY	3

E. IF **YES** ON B (i.e. Code 1 on B), ASK QUESTIONS 1 TO 9 ONLY

IF **YES** ON D (i.e. Code 1 on D), ASK QUESTIONS 10-20 ONLY

IF BOTH **YES** ON B AND **YES** ON D, (i.e. Code 1 on B and D) ASK QUESTIONS 1 TO 21 STRAIGHT THROUGH.

IF NOT **YES** ON B OR D (ie. not Code 1 on B or D), TERMINATE.

→ IF MAIN DECISION MAKER IN PURCHASE OF CARS FOR INDIVIDUAL USE (ie. Code 1 on B), ASK: (Otherwise toss to Q10)

1a. First, I am going to ask you some questions about the cars you decided to lease or purchase for the use of a particular individual, for example a senior executive.

Looking at the first **green** card which of these factors did you consider when choosing which cars to purchase or lease **for individuals**? Which other factors did you consider? Any others?

CIRCLE **ALL** FACTORS MENTIONED IN **COL.1** BELOW. ↓

	Col.1:1a		Col.2:1b
AFTER SALES/LEASE SERVICE	1		1
AUSTRALIAN MADE	2		2
COMFORT	3		3
FUEL ECONOMY	4		4
OPTIONAL FEATURES	5		5
PURCHASE COST/LEASE COST	6		6
PERFORMANCE	7		7
QUALITY OF WORKMANSHIP	8		8
RELIABILITY	9	Ask	9
REPUTATION OF MAKE/MODEL ...	10	1b	10
RE-SALE VALUE	11		11
SAFETY FEATURES	12		12
SEATING CAPACITY	13		13
STYLE/LOOK/COLOUR	14		14
VALUE FOR MONEY	15		15
WARRANTY	16		16
OTHER (PLEASE SPECIFY)			
.....			
.....	17		17
NONE	18	Toss	
CAN'T SAY	19	to 2	19

→ IF **MORE THAN ONE** REASON CIRCLED IN **COL.1**, ASK:

1b. What was the most important factor you considered when deciding to purchase or lease these cars?

CIRCLE MOST **IMPORTANT** FACTOR IN **COL.2** ABOVE. ↑

→ ASK **EVERYONE**:

2. Were there any safety options **available** on **any** of the cars you decided to purchase or lease for individuals which were designed to prevent an accident or to protect occupants in the case of an accident?

YES	1	Ask 3
NO	2	Toss
CAN'T SAY	3	to 6

→ IF **YES** ON Q2 (i.e. Code 1 on Q2), ASK:

3. What were those safety options?

PRINT ALL MENTIONED:

.....

.....

CAN'T SAY X

---

4. Were those safety options included on **all** or only **some** of the cars with safety options available that you decided to purchase or lease for individuals?

YES	1	Toss to 6
NO, ONLY INCLUDED ON SOME CARS	2	Ask 5
NO, NOT INCLUDED ON ANY CARS	3	
CAN'T SAY	4	Toss to 6

IF SAFETY OPTIONS **NOT** INCLUDED ON SOME/ANY CARS (ie. Code 2 or 3 on Q4), ASK:

5. Why did you decide **not** to include those options on (all)(some) of the cars with safety options available that you decided to purchase or lease for individuals? CIRCLE **ALL** REASONS MENTIONED.

TOO EXPENSIVE	1
UNNECESSARY/NO NEED	2
PREFERRED OTHER OPTIONS	3
OTHER (Please specify)	
.....	
.....	4
CAN'T SAY	5

→READ OUT:

6. The Federal Office of Road Safety has been looking at ways to improve the safety of people in the front seat of cars.

Even in a low speed crash, that is at about 60 km/h, people wearing seat belts can still get injuries to the head, chest and legs from hitting the steering wheel and dash board.

In a 60 km per hour frontal crash, the force of the impact is the same as falling from a four storey building.

Some of the problems that lead to injuries are:

1. moving forward before the seat belt has time to lock up.
2. sliding on the seat and under the seat belt.
3. some people still not wearing seat belts.

These injuries can be reduced by stopping people being thrown too far forward in a crash, by making the areas of the car that people often hit in an accident softer and by encouraging people to wear seat belts at all times.

Looking at the next **pink** card, these features have been developed to make people in the front seats safer.

→CONTINUE TO READ OUT WHILE RESPONDENT IS LOOKING AT THE CARD.

Improved Seat Belt Systems

Seat belts can be made better at stopping people from being thrown forward in a crash. This can be done by making the seat belt lock up faster and tighter when a crash occurs, and by making them fit better (such as by putting the mountings on the seat frame).

Improved Seat Design

The seats in cars can be made better by stopping people from sliding under the seat belt. This can be done by improving the base of the seat and by putting more padding in the seat.

Improved Leg Protection

Injuries to peoples' legs and lower bodies can be reduced by padding the lower area of the dash board in front of a person's knees.

Padded Steering Wheels

Car drivers often get hurt in a crash by hitting the steering wheel, even when they are wearing seat belts. The driver can be made safer by using a softer and better made steering wheel.

A Seatbelt Warning Device

A number of people are still being hurt in a crash because they do not wear a seat belt. People can be encouraged to wear a seat belt by using a seat belt warning alarm. This alarm lets the driver and others know when someone has forgotten to put on their seatbelt.

Summary

These options are better at improving people's safety when they're all put into a car at the same time. If only one or two of these options are used they would not be as good as if all the options were used.

Extensive research conducted by the Federal Office of Road Safety has shown that in cars with those safety features, occupant injuries and fatalities would be reduced by up to 17%.

Please take a moment to read the **next white** card. On it you will see a picture of a car fitted with the safety features we just talked about.

The safety features marked in different colours on the card are:

1. Improvements to seat design - Shown in GREEN
2. Improvements to existing seat belt systems - Shown in DARK BLUE
3. Improved leg protection - Shown in PURPLE
4. Padded steering wheels - Shown in YELLOW
5. Seat belt warning devices - Shown in LIGHT BLUE

6a. Would your organisation be willing to pay or have built into total lease payments an additional cost of $350 per car to have these safety features provided in new cars purchased or leased for individuals?

YES	1	Ask 6b
NO	2	Toss to 7a

→ IF **YES** ON 6a, ASK:

6b. Would your organisation be willing to pay an additional cost of $500 per car?

YES	1	Toss to 8
NO	2	Ask 6c

→ IF **NO** ON 6b, ASK:

6c. Would your organisation be willing to pay an additional cost of $400 per car?

YES	1	Ask 6d
NO	2	Toss to 8

→ IF **YES** ON 6c, ASK:

6d. Would your organisation be willing to pay an additional cost of $450 per car?

YES	1	Toss
NO	2	to 8

→ IF NO ON 6a, ASK:

7a. Would your organisation be willing to pay an additional cost of $200 per car?

YES	1	Ask 7b
NO	2	Toss to 8

→ IF YES ON 7a, ASK:

7b. Would your organisation be willing to pay an additional cost of $300 per car?

YES	1	Toss to 8
NO	2	Ask 7c

→ IF NO ON 7b, ASK:

7c. Would your organisation be willing to pay an additional cost of $250 per car?

YES	1	Toss
NO	2	to 8

→ READ OUT:

8. The next **pink** card describes a driver airbag.

Driver Airbag

Car drivers often get badly hurt in a crash because they hit the steering wheel and dash board. Injuries to the head, chest and stomach can be reduced by having an Air Bag fitted to the steering wheel. In a crash the Air Bag pops out of the steering wheel and inflates stopping the driver from hitting the steering wheel and dash board and then deflates immediately. An Air Bag works best when a driver is also wearing a seat belt.

Looking at the next **white** card, these pictures show how an Air Bag works.

Research has shown that in cars with a Driver Airbag **and** the other safety features mentioned earlier, occupant injuries & fatalities would be reduced by up to 25%.

Please take a moment to read the **next white** card. On it you will see a picture of the same safety features shown earlier, with the addition of a driver air bag (shown in red) in the steering wheel.

8a. Would your organisation be willing to pay or have built into total lease payments an additional cost of $1,000 per car to have all of these safety devices provided in the new cars purchased or leased for individuals?

YES	1	Ask 8b
NO	2	Toss to 9a

→ IF **YES** ON 8a, ASK:

8b. Would your organisation be willing to pay an additional cost of $1,600 per car?

YES	1	Toss to 10
NO	2	Ask 8c

→ IF **NO** ON 8b, ASK:

8c. Would your organisation be willing to pay an additional cost of $1,200 per car?

YES	1	Ask 8d
NO	2	Toss to 10

→ IF **YES** ON 8c, ASK:

8d. Would your organisation be willing to pay an additional cost of $1,400 per car?

YES	1	Toss
NO	2	to 10a

→ IF NO ON 8a, ASK:

9a. Would your organisation be willing to pay an additional cost of $600 per car?

YES	1	Ask 9b
NO	2	Go to 10a

→ IF YES ON 9a, ASK:

9b. Would your organisation be willing to pay an additional cost of $800 per car?

YES	1	Toss
NO	2	to 10a

→ IF MAIN DECISION MAKER IN PURCHASE OF CARS FOR GENERAL USE (i.e. Code 1 on D), ASK 10 - 20: (OTHERWISE TOSS TO Q21)

10a. (First) I am (now) going to ask you some questions about the cars you decided to lease or purchase for general use, that is, cars which have been acquired to meet the day to day business needs of the organisation, and are usually driven by more than one person.

Looking (back) at the (first) **green** card, which of these factors did you consider when choosing which cars to purchase or lease **for general use**? Which other factors did you consider? Any others?

CIRCLE **ALL** FEATURES MENTIONED IN **COL.1** BELOW.

	Col.1:10a		Col.2:10b
AFTER SALES/LEASE SERVICE	1		1
AUSTRALIAN MADE	2		2
COMFORT	3		3
FUEL ECONOMY	4		4
OPTIONAL FEATURES	5		5
PURCHASE COST/LEASE COST	6		6
PERFORMANCE	7		7
QUALITY OF WORKMANSHIP	8		8
RELIABILITY	9	Ask	9
REPUTATION OF MAKE/MODEL	10	10b	10
RE-SALE VALUE	11		11
SAFETY FEATURES	12		12
SEATING CAPACITY	13		13
STYLE/LOOK/COLOUR	14		14
VALUE FOR MONEY	15		15
WARRANTY	16		16
OTHER (PLEASE SPECIFY)			
.....	17		17
NONE	18	Toss	
CAN'T SAY	19	to 11	19

→ IF **MORE THAN ONE** REASON CIRCLED IN **COL.1**, ASK:

10b. What was the most important factor you considered when deciding to purchase or lease these cars?

CIRCLE **MOST IMPORTANT** FACTOR IN **COL.2** ABOVE.

→ ASK **EVERYONE**:

11. Were there any safety options **available** on **any** of the cars you decided to purchase or lease for general use which were designed to prevent an accident or to protect occupants in the case of an accident?

YES	1	Ask 12
NO	2	Toss
CAN'T SAY	3	to 15a

→ IF CODE 1 ON Q11, ASK:

12. What were those safety options?

PRINT ALL MENTIONED:

.....

.....

CAN'T SAY X

13. Were those safety options included on **all** or only **some** of the cars with safety options available that you decided to purchase or lease for general use?

YES	1	Toss to 15a
NO, ONLY INCLUDED ON SOME CARS	2	Ask
NO, NOT INCLUDED ON ANY CARS	3	14
CAN'T SAY	4	Toss to 15a

IF SAFETY OPTIONS **NOT** INCLUDED ON SOME/ANY CARS (ie. Code 2 or 3 on Q 13), ASK:

14. Why did you decide not to include those options on (all)(some) of the cars with safety options available that you decided to purchase or lease for general use? CIRCLE **ALL** REASONS MENTIONED.

TOO EXPENSIVE	1
UNNECESSARY/NO NEED	2
PREFERRED OTHER OPTIONS	3
OTHER (Please specify)	
.....	
.....	4
CAN'T SAY	5

→ IF RESPONDENT PURCHASED OR LEASED CARS FOR INDIVIDUALS (ANSWERED Q1-9) **AND** FOR GENERAL USE READ OUT:
(OTHERWISE TOSS TO 15b)

15a. The following questions are about your organisation's willingness to pay for inclusion of the safety devices mentioned earlier, except the airbag, in cars purchased or leased for **general use**.

Please take a moment to read the **next white** card. On it you will see a picture of a car fitted with the safety features we just talked about earlier without the airbag.

The safety features marked in different colours on the card are:

1. Improvements to seat design - Shown in GREEN
2. Improvements to existing seat belt systems - Shown in DARK BLUE
3. Improved leg protection - Shown in PURPLE
4. Padded steering wheels - Shown in YELLOW
5. Seat belt warning devices - Shown in LIGHT BLUE

→ Toss to 16a

→ IF RESPONDENT PURCHASED OR LEASED CARS FOR GENERAL USE ONLY (i.e DIDN'T ANSWER Q1-9), READ OUT:

15b. The Federal Office of Road Safety has been looking at ways to improve the safety of people in the front seat of cars.

Even in a low speed crash, that is at about 60 km/h, people wearing seat belts can still get injuries to the head, chest and legs from hitting the steering wheel and dash board.

In a 60 km per hour frontal crash, the force of the impact is the same as falling from a four storey building.

Some of the problems that lead to injuries are:

1. moving forward before the seat belt has time to lock up.
2. sliding on the seat and under the seat belt.
3. some people still not wearing seat belts.

These injuries can be reduced by stopping people being thrown too far forward in a crash, by making the areas of the car that people often hit in an accident softer and by encouraging people to wear seat belts at all times.

Looking at the next **pink** card, these features have been developed to make people in the front seats safer.

→ CONTINUE TO READ OUT WHILE RESPONDENT IS LOOKING AT THE CARD.

Improved Seat Belt Systems

Seat belts can be made better at stopping people from being thrown forward in a crash. This can be done by making the seat belt lock up faster and tighter when a crash occurs, and by making them fit better (such as by putting the mountings on the seat frame).

Improved Seat Design

The seats in cars can be made better by stopping people from sliding under the seat belt. This can be done by improving the base of the seat and by putting more padding in the seat.

Improved Leg Protection

Injuries to peoples' legs and lower bodies can be reduced by padding the lower area of the dash board in front of a person's knees.

Padded Steering Wheels

Car drivers often get hurt in a crash by hitting the steering wheel, even when they are wearing seat belts. The driver can be made safer by using a softer and better made steering wheel.

A Seatbelt Warning Device

A number of people are still being hurt in a crash because they do not wear a seat belt. People can be encouraged to wear a seat belt by using a seat belt warning alarm. This alarm lets the driver and others know when someone has forgotten to put on their seatbelt.

Summary

These options are better at improving people's safety when they're all put into a car at the same time. If only one or two of these options are used they would not be as good as if all the options were used.

Extensive research conducted by the Federal Office of Road Safety has shown that in cars with those safety features, occupant injuries and fatalities would be reduced by up to 17%

Please take a moment to read the **next white** card. On it you will see a picture of a car fitted with the safety features we just talked about earlier without the airbag.

The safety features marked in different colours on the card are:

1. Improvements to seat design - Shown in GREEN
2. Improvements to existing seat belt systems - Shown in DARK BLUE
3. Improved leg protection - Shown in PURPLE
4. Padded steering wheels - Shown in YELLOW
5. Seat belt warning devices - Shown in LIGHT BLUE

→ ASK **EVERYONE**:

16a. Would your organisation be willing to pay or have built into total lease payments an additional cost of $350 per car to have these safety features provided in new cars purchased or leased for general use?

YES	1	Ask 16b
NO	2	Toss to 17a

→ IF **YES** ON 16a, ASK:

16b. Would your organisation be willing to pay an additional cost of $500 per car?

YES	1	Toss to 18a
NO	2	Ask 16c

→ IF **NO** ON 16b, ASK:

16c. Would your organisation be willing to pay an additional cost of $400 per car?

YES	1	Ask 16d
NO	2	Toss to 18a

→ IF **YES** ON 16c, ASK:

16d. Would your organisation be willing to pay an additional cost of $450 per car?

YES	1	Toss
NO	2	to 18a

→ IF NO ON 16a, ASK:

17a. Would your organisation be willing to pay an additional cost of $200 per car?

YES	1	Ask 17b
NO	2	Toss to 18a

→ IF YES ON 17a, ASK:

17b. Would your organisation be willing to pay an additional cost of $300 per car?

YES	1	Toss to 18a
NO	2	Ask 17c

→ IF NO ON 17b, ASK:

17c. Would your organisation be willing to pay an additional cost of $250 per car?

YES	1	Toss
NO	2	to 18a

→ IF RESPONDENT PURCHASED OR LEASED CARS FOR INDIVIDUALS (ANSWERED Q1-9) **AND** FOR GENERAL USE, READ OUT:

18a. The following questions are about your organisation's willingness to pay for inclusion of the safety devices mentioned earlier, **including** the airbag, in cars purchased or leased for **general use**.

Please take a moment to read the next **white** card. On it you will see a picture of the same safety features shown earlier, with the addition of a driver air bag (shown in red) in the steering wheel.

→ Toss to 19a

→ IF RESPONDENT PURCHASED OR LEASED CARS FOR GENERAL USE ONLY (i.e. DIDN'T ANSWER Q1-9), READ OUT:

18b. The next **pink** card describes a driver airbag.

Driver Airbag

Car drivers often get badly hurt in a crash because they hit the steering wheel and dash board. Injuries to the head, chest and stomach can be reduced by having an Air Bag fitted to the steering wheel. In a crash the Air Bag pops out of the steering wheel and inflates stopping the driver from hitting the steering wheel and dash board and then deflates immediately. An Air Bag works best when a driver is also wearing a seat belt.

Looking at the next **white** card, these pictures show how an Air Bag works.

Research has shown that in cars with a Driver Airbag **and** the other safety features mentioned earlier, occupant injuries & fatalities would be reduced by up to 25%.

Please take a moment to read the next **white** card. On it you will see a picture of the same safety features shown earlier, with the addition of a driver air bag (shown in red) in the steering wheel.

→ ASK **EVERYONE**:

19a. Would your organisation be willing to pay or have built into total lease payments an additional cost of $1,000 per car to have all of these safety features provided in the new cars purchased or leased for general use?

YES	1	Ask 19b
NO	2	Toss 20a

→ IF **YES** ON 19a, ASK:

19b. Would your organisation be willing to pay an additional cost of $1,600 per car?

YES	1	Toss to 21
NO	2	Ask 19c

→ IF **NO** ON 19b, ASK:

19c. Would your organisation be willing to pay an additional cost of $1,200 per car?

YES	1	Ask 19d
NO	2	Toss to 21

→ IF **YES** ON 19c, ASK:

19d. Would your organisation be willing to pay an additional cost of $1,400 per car?

YES	1	Toss
NO	2	to 21

→ IF NO ON 19a, ASK:

20a. Would your organisation be willing to pay or have built into lease payments an additional cost of $600 per car?

YES	1	Ask 20b
NO	2	Go to 21

→ IF YES ON 18a, ASK:

20b. Would your organisation be willing to pay or have built into lease payments an additional cost of $800 per car?

YES	1	Go to
NO	2	21

21. Thank you for your time and co-operation.

Interviewer to sign for a true and correct interview:

_____ ____/____/92

Appendix 4

Prompt Cards

NEW CAR LIST

GENERAL MOTORS HOLDEN

111 Barina
125 Nova Hatchback
126 Nova Sedan
134 Apollo
150 Commodore
151 Berlina
153 Calais

FORD

211 Festiva
222 Laser, TX3
224 Capri
230 Corsair
232 Telstar
233 TX5
251 6 cyl. Falcon
252 8 cyl. Falcon
253 Falcon; Can't say type
254 6 cyl. Fairmont
255 8 cyl. Fairmont

MITSIBISHI/CHRYSLER

320 Colt
321 Lancer
325 Nimbus
334 Magna
335 Galant
341 Verada

TOYOTA

420 Corolla
424 Corolla Seca
425 MR2
426 Paseo
431 Celica
432 Camry
451 Lexcen
473 Tarago

NISSAN/DATSUN

522 Pulsar Hatchback
526 Pulsar Vector Sedan
532 Pintara
538 NX
540 Skyline, Silhouette

MAZDA

610 121
622 323, Astina
623 MX-5
634 626

OTHER JAPANESE

711 Daihatsu Charade
713 Suzuki Swift
720 Honda Civic
721 Subaru Leone
722 Honda Concerto
723 Subaru 4X4 Touring Wagon
725 Hyundai Excel, SPRINT
726 Hyundai Coupe, GLS S
727 Daihatsu Applause
728 Hyundai Lantra
730 Honda Accord
731 Honda Prelude
732 Honda Integra
733 Honda CRX
734 Hyundai Sonata
735 Subaru Liberty

EUROPEAN

820 VW Golf
826 Lada Samara
827 Peugeot 205
828 Citroen AX
833 Renault 19
836 Alfa Romeo 33GCL
842 Peugeot 404, 405
846 Volvo 240
855 Other Citroen

Car Registered in the name of:

Our family company or business..1

A **company** or business **not owned** by our family..2

A leasing company or rental company..3

Government Department or Organization..4

My name..5

Husband..6

Wife..7

Father..8

Mother..9

Other male member of household..11

Other female member of household..12

Someone else (Please name relationship)

Main Reason for Purchasing Car

Replace an older car..1

Replace a car damaged in an accident..2

Buy first car..3

Buy an additional car..4

Buy car to replace other mode of transport..5

Other (please specify)

Features considered when choosing car

After sales service..1

Australian made..2

Comfort (seats, noise level, etc.)..3

Cost..4

Fuel economy..5

Optional features (anything not standard)..6

Performance (eg. torque, acceleration, power, handling,etc.)..7

Quality of workmanship..8

Reliability..9

Reputation of make/model..10

Re-sale value..11

Safety features (standard or optional)..12

Seating capacity..13

Style/look/colour..14

Value for money..15

Warranty..16

Other (please specify)

Standard/Optional Features

Air conditioning..1

Anti-lock braking (ABS)..2

Anti-theft devices/alarms..3

Automatic transmission..4

Central locking..5

Cruise control..6

Limited slip differential (LSD)..7

Metallic paintwork..8

Non-standard wheels and tyres..9

Power steering..10

Power windows/mirrors..11

Sunroof..12

Other (please specify)

Improved Seat Belt Systems

Seat belts can be made better at stopping people from being thrown forward in a crash. This can be done by making the seat belt lock up faster and tighter when a crash occurs, and by making them fit better (such as by putting the mountings on the seat frame).

Improved Seat Design

The seats in cars can be made better by stopping people from sliding under the seat belt. This can be done by improving the base of the seat and by putting more padding in the seat.

Improved Leg Protection

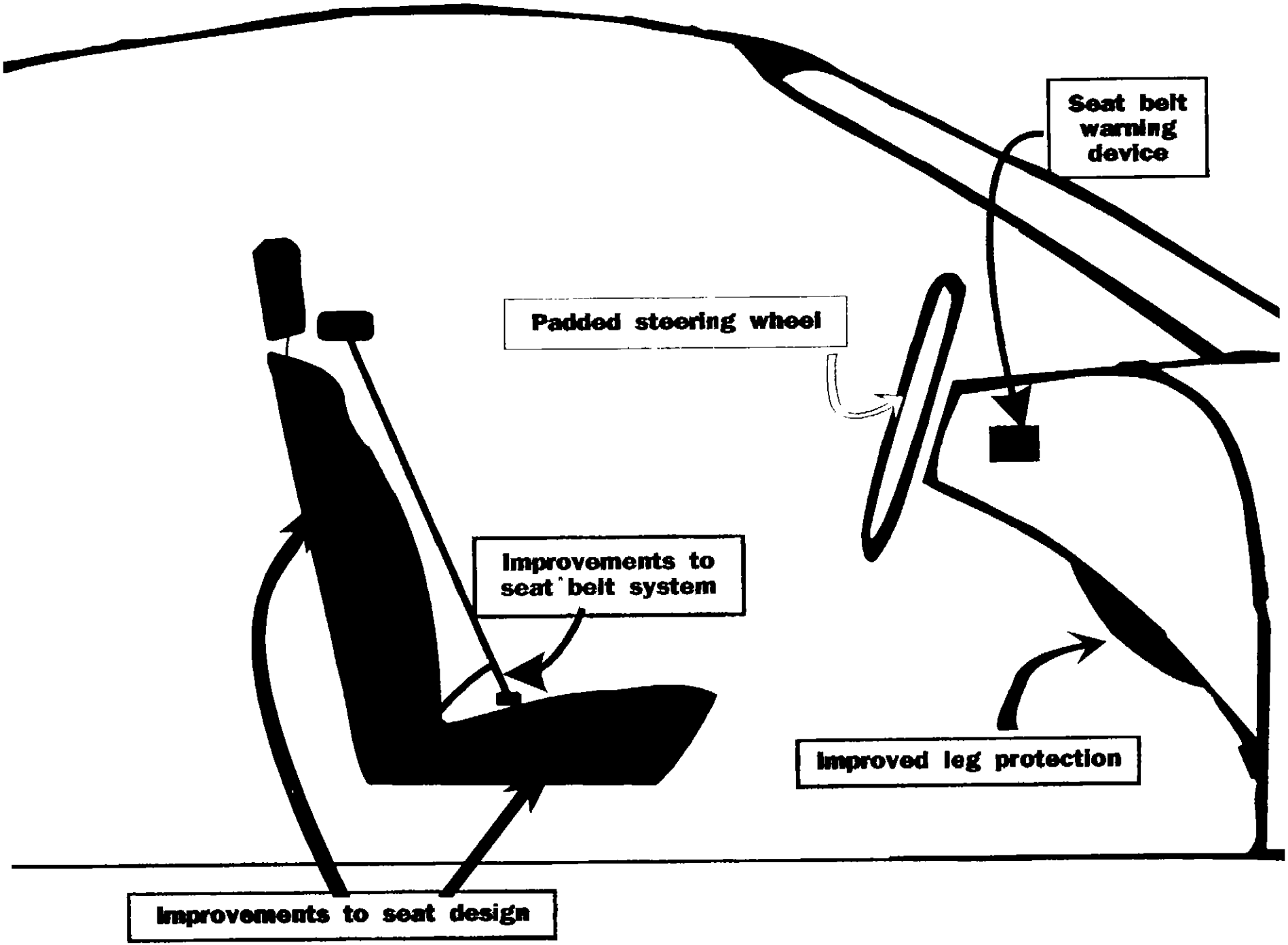
Injuries to peoples' legs and lower bodies can be reduced by padding the lower area of the dash board in front of a person's knees.

Padded Steering Wheels

Car drivers often get hurt in a crash by hitting the steering wheel, even when they are wearing seat belts. The driver can be made safer by using a softer and better made steering wheel.

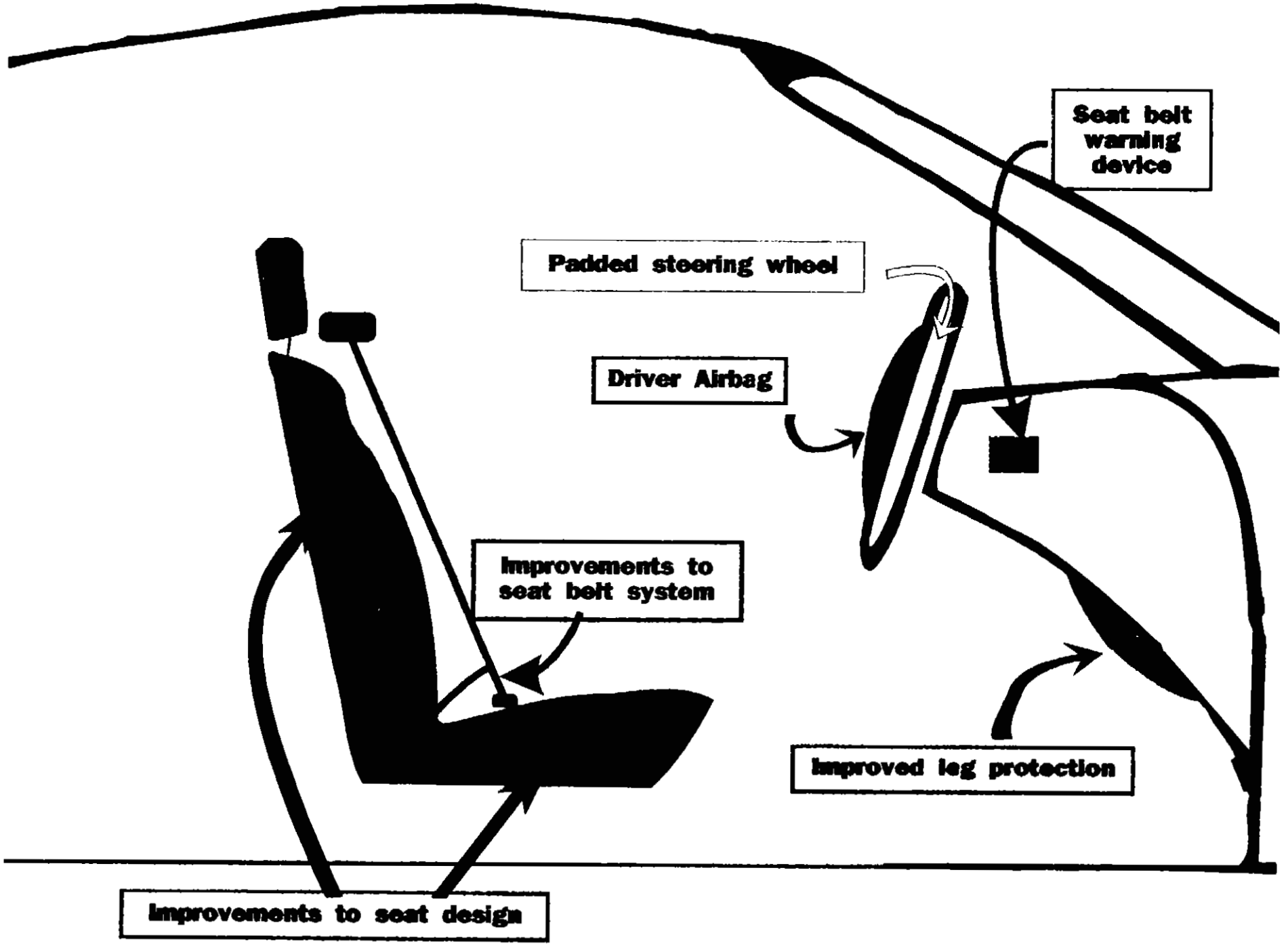
A Seatbelt Warning Device

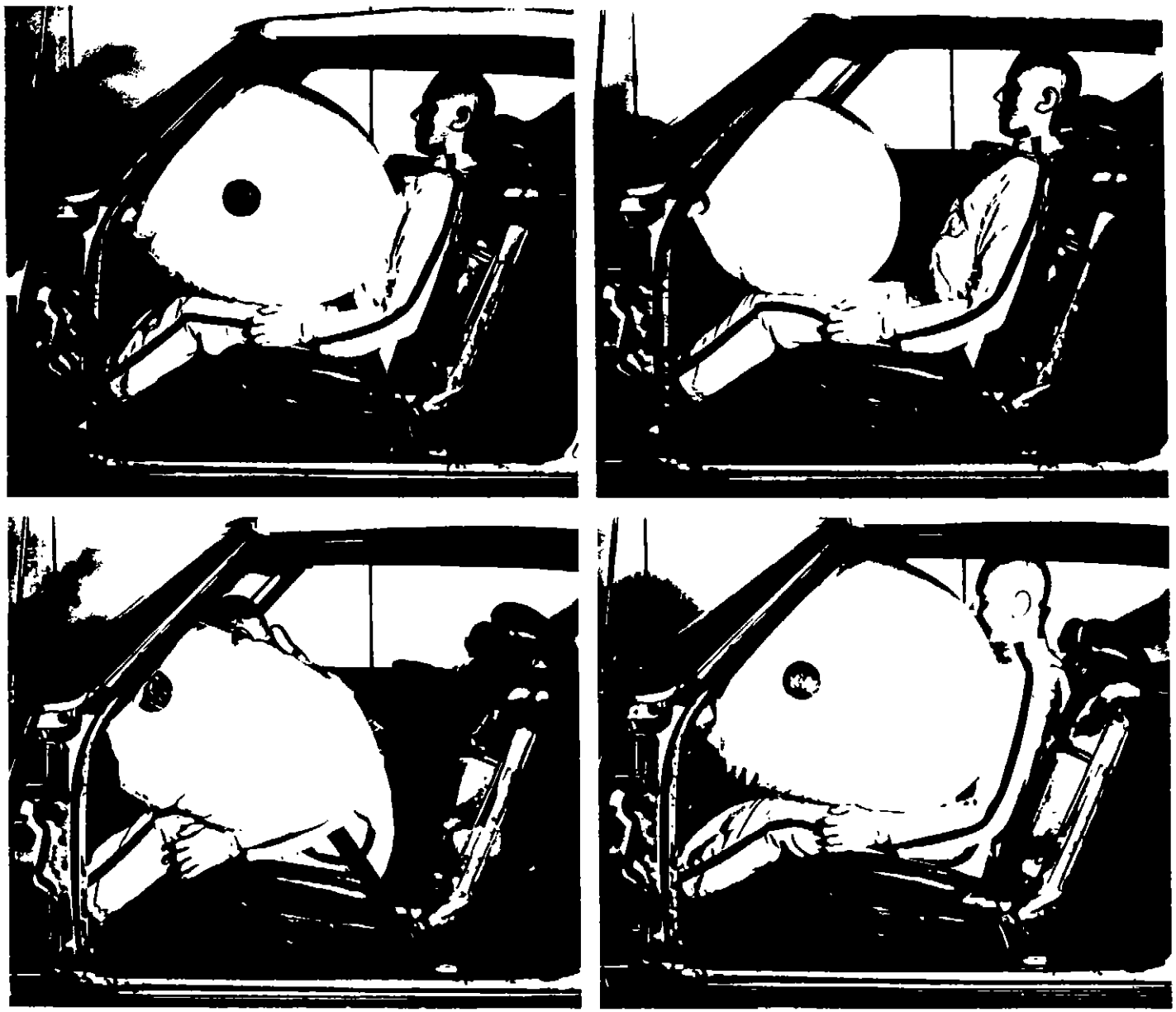
A number of people are still being hurt in a crash because they do not wear a seat belt. People can be encouraged to wear a seat belt by using a seat belt warning alarm. This alarm lets the driver and others know when someone has forgotten to put on their seatbelt.


Seat belt warning device
Padded steering wheel
Improvements to seat belt system
Improved leg protection
Improvements to seat design

Driver Airbag

Car drivers often get badly hurt in a crash because they hit the steering wheel and dash board. Injuries to the head, chest and stomach can be reduced by having an Air Bag fitted to the steering wheel. In a crash the Air Bag pops out of the steering wheel and inflates **stopping the driver from hitting** the **steering wheel** and **dash board** and then deflates immediately. An Air Bag works best when a driver is also wearing a seat belt.


Seat belt warning device
Padded steering wheel
Driver Airbag
Improvements to seat belt system
Improved leg protection
Improvements to seat design



Please read through all the card before answering

Some primary school..1

Finished primary school..2

Some secondary school..3

Some technical or commercial..4

Passed School Certificate, Passed 4th form, Passed Intermediate, Year 10, Junior or Achievement certificate..5

Passed 5th form, Year 11, Passed Leaving or Sub-senior certificate..6

Finished Technical school or Commercial College or TAFE including trade certificate, other certificate or apprenticeship..7

Finished or now studying for Matriculation, Higher School Certificate (H.S.C), or (V.C.E.), Year 12, or Senior certificate..8

Some University or some College of Advanced Education training..9

Diploma from College of Advanced Education or TAFE (Not Degree), Tertiary or Management training including Diploma (other than University Degree)..10

Now at University or College of Advanced Education..11

Degree from University, College of Advanced Education or higher Degree..12

13/4/91

Education

Total income before deducting income tax

(Just say the letter after your answer)

Less than $116 a week	OR	Less than $5,999 a year..**C**
$117 - 192 a week	OR	$6,000 - 9,999 a year..**E**
$193 - 288 a week	OR	$10,000 - 14,999 a year..**G**
$289 - 384 a week	OR	$15,000 - 19,999 a year..**I**
$385 - 481 a week	OR	$20,000 - 24,999 a year..**J**
$482 - 577 a week	OR	$25,000 - 29,999 a year..**K**
$578 - 673 a week	OR	$30,000 - 34,999 a year..**L**
$674 - 769 a week	OR	$35,000 - 39,999 a year..**M**
$770 - 864 a week	OR	$40,000 - 44,999 a year..**P**
$865 - 961 a week	OR	$45,000 - 49,999 a year..**Q**
$962 - 1153 a week	OR	$50,000 - 59,999 a year..**R**
$1154 - 1346 a week	OR	$60,000 - 69,999 a year..**S**
$1347 - 1538 a week	OR	$70,000 - 79,999 a year..**T**
$1539 - 1730 a week	OR	$80,000 - 89,999 a year..**U**
$1731 - 1923 a week	OR	$90,000 - 99,999 a year..**V**
$1924 or more a week	OR	$100,000 or more a year..**W**

4/4/87

INCOME

Total cost of car

(Just say the number after your answer)

$12,000 - $14,999..1

$15,000 - $19,999..2

$20,000 - $24,999..3

$25,000 - $29,999..4

$30,000 - $35,000..5

NO ANSWER..6