



Driver survey: Republic of Ireland 2017



January 2018



Contents

1. Why Ireland?
2. What is the Irish driver survey?
3. How can I access the Irish driver survey?

➡ GiPA operates in 47 countries throughout the world.



1. Why Ireland?



Driver survey: Republic of Ireland (n=1,000)

- ⇒ GiPA has introduced a new survey for the Republic of Ireland, based on the well-established GiPA Drivers Survey.
- ⇒ Looking at the Irish car parc, its characteristics, and the country's drivers behaviour and workshop entries, the research carried out has assisted clients understand better this market as a whole and analyse its aftermarket potential.

The country is appealing for various reasons:

- ⇒ New car registrations in the Republic of Ireland have seen rapid growth in recent years:
 - ✓ Registrations rose to 146,649 in 2016, almost double the registrations seen in 2013.
 - ✓ However, registrations fell 10% in 2017, down to 131,332*.
- ⇒ International investment has been forthcoming: a number of big players have decided to set up base in Ireland in recent years.

*Source: SIMI

1. Why Ireland?



Aftermarket potential:

- ⇒ Population: **4.773 million**.
- ⇒ Two-fifths of the population is **<30 years old**.
- ⇒ The **fastest growing economy** in the EU in 2016, for the fourth year in a row.
- ⇒ GDP of **\$294.1bn**.

Strong automotive industry

- ⇒ 10th highest new car registrations in Europe in 2016 (**145,656**).
- ⇒ An average increase of **26%** in new car registrations year on year between 2013 and 2016 positions Ireland in second for registrations growth in Europe.

Dynamic car parc

- ⇒ A passenger car parc of over 2 million vehicles.
- ⇒ A car parc older than the UK's.
- ⇒ Home to the third largest <1-2 year old segment in Europe by percentage, due to excellent registration figures in recent years.
- ⇒ The Irish aftermarket's potential has drawn the focus of a number of large European aftermarket players i.e. Euro Car Parts/LKQ, who have begun setting up base there.





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2. What is the Irish driver survey?

Driver survey: Republic of Ireland



⇒ Vehicle segment: **passenger cars**

⇒ Content is based on international ATO drivers surveys, for easy country comparison

Driver survey: the full Package

Products

- ✓ Drivers survey (1,000 drivers)
- ✓ Marketing cards
- ✓ Addons: lubricant & tyre market brand awareness

+

Services

- ✓ Individual meeting presentation
- ✓ Individual support
- ✓ extr@net service

2. What is the Irish driver survey?



Methodology

- ⇒ Face to face interview allowing interview length up to 30 minutes.

Target

- ⇒ Drivers having at their disposal a vehicle; permanent use; responsible for its maintenance.

Sample

- ⇒ The sample is representative of the driver population and based on defined quotas:
 - ✓ Gender
 - ✓ Age
 - ✓ Profession
 - ✓ Region
 - ✓ Urban/ rural

Questionnaire

- ⇒ Driver questionnaire follows GiPA Group best practice.
- ⇒ Driver questionnaire follows GiPA Group headlines to enable international comparison.



2. Drivers survey content

1 – Characteristics of the car parc

- Car parc age
- Kilometre on odometer
- Engine type
- Type of car (new/ used distribution)
- Place of car purchase

2 – Driver behaviour

- Annual kilometres driven
- Internet usage for maintenance

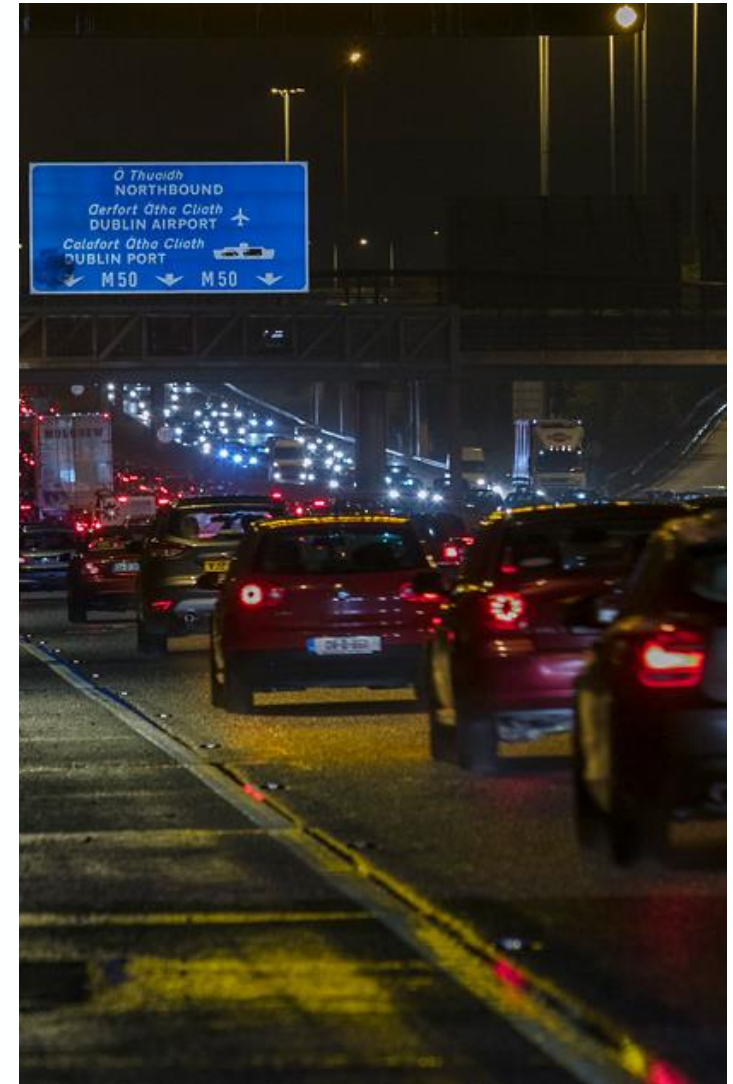
3 – DIY behaviour

- Do-it-yourself behaviour
- Details of operations
- Buying channels

4 – Workshop entry analysis

- Total volume of entry
- Distribution of workshop entry per type (service, tyres, breakdown...)
- Details of operations carried out
- Market share per players type in volume
- Market share per players type in value
- Cost of workshop entry

...



2. Marketing cards: information per product type



- ⇒ From interviewing 1,000 drivers face to face, GiPA can capture more information about parts market. This information will be detailed in a marketing card for each part.
- ⇒ Information provided includes: replacement rate; volume; share of do-it-yourself, buy & fit, do-it-for-me; OES/IAM market share (at driver level); replacement rate by car age, channel market share by car age.
- ⇒ Products investigated include:
 - ✓ Air conditioning
 - ✓ Battery
 - ✓ Brake pads / brake discs
 - ✓ Filters
 - ✓ Plugs
 - ✓ Oil change
 - ✓ Lighting
 - ✓ Tyres
 - ✓ Wiper blades
 - ✓ ...



Sample size:
1,000 drivers

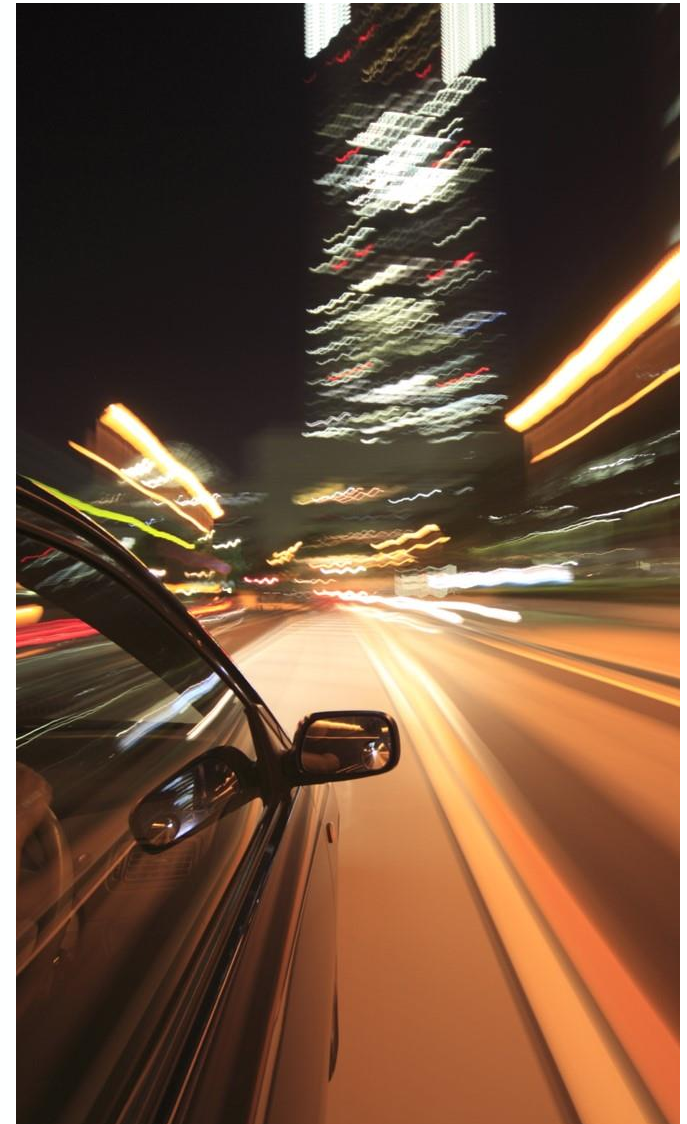
2. Add-ons – Brand awareness

In addition to our drivers survey and marketing cards, we are also offering the following brand awareness add-ons:

Lubricants

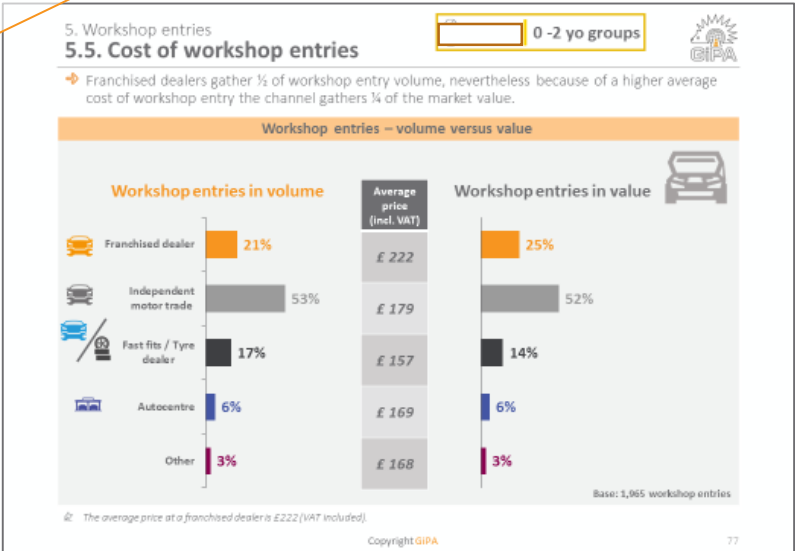
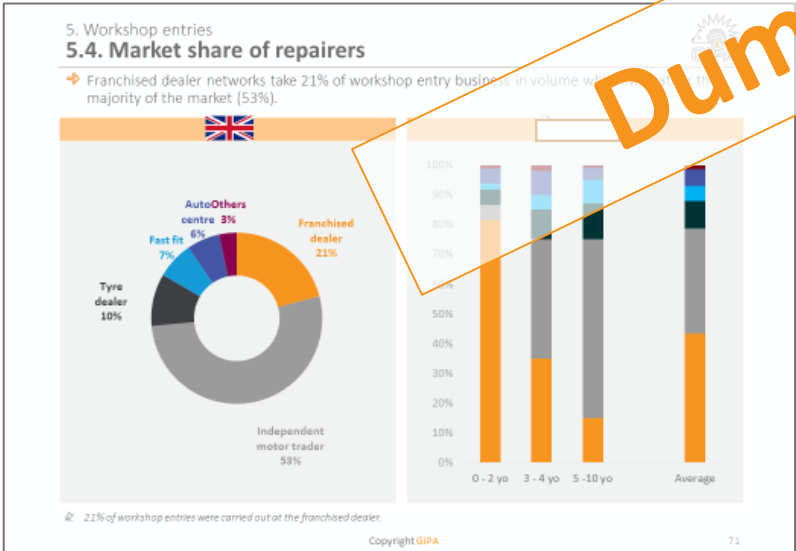
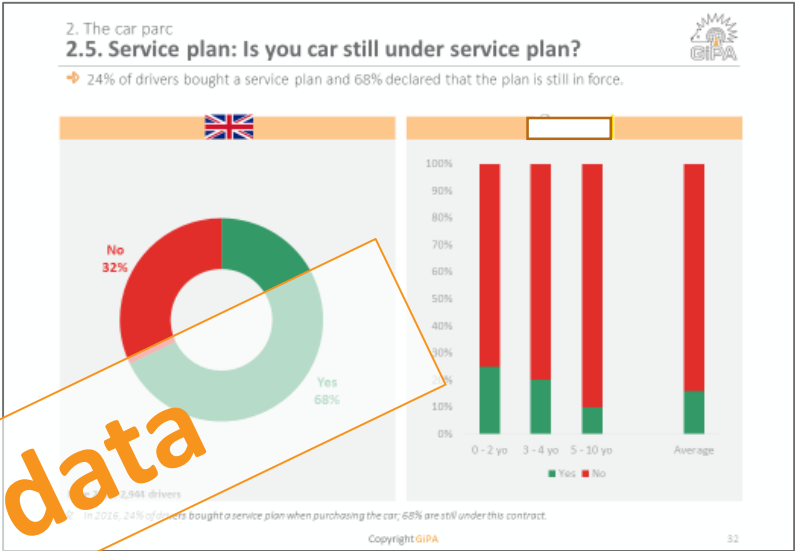
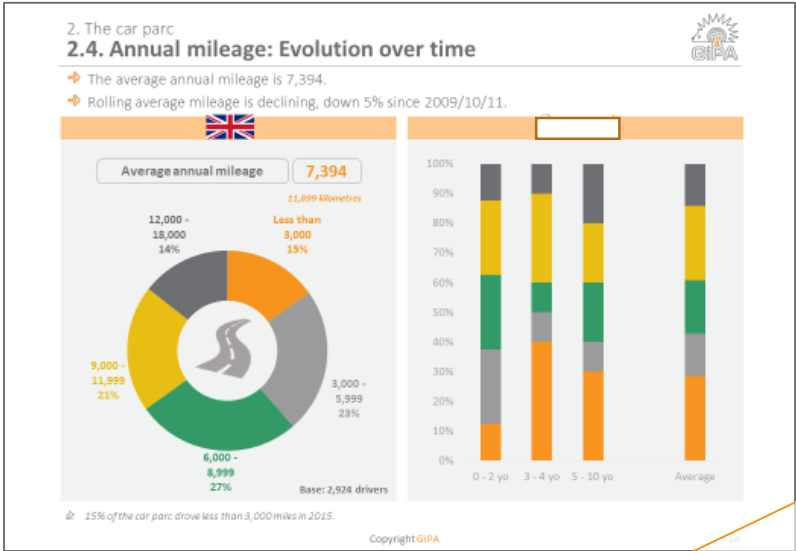
Tyres

- ✓ **Brand awareness:** The top brands drivers' are aware of, and important selection criteria when purchasing.



Driver survey: Republic of Ireland 2017

2. Data analysis report example





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GiPA's Republic of Ireland driver survey results are available **now**.



For more information regarding our report on Ireland, and see how GiPA can assist your business with its aftermarket activity, please contact **Quentin Le Hetet** via phone (**+44 20 361 721 80**) or email (**qlehetet@gipa.eu**).

Thank you for your attention



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