

RESEARCH SERIES

CHINA'S QUEST FOR CAR OWNERSHIP

 **FOUNDATION**



The FIA Foundation is an independent UK registered charity which supports an international programme of activities promoting road safety, the environment and sustainable mobility, as well as funding motor sport safety research. Our aim is to ensure 'Safe, Clean, Fair and Green' mobility for all, playing our part to ensure a sustainable future.

The FIA Foundation Research Paper series seeks to provide interesting insights into current issues, using rigorous data analysis to generate conclusions which are highly relevant to current global and local policy debates.



Cultural Dynamics Strategy and Marketing Ltd (CDSM) has been measuring the nature of cultural change and personal values for 40 years in many countries around the world, including previous research in China.

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SUMMARY

The scale and pace of social and economic change in China over the past 15 years is unprecedented. Chinese national income per capita in 2013 was more than three times the level it had been in 2000.¹ This has been accompanied by mass migration from rural areas to cities. The urban population in China has increased from 26% of the total population in 1990 to 36% in 2000 and 51% by 2010.² By 2025 one billion people in China will live in urban areas.³

The population of China is currently around 1.4 billion. Unlike many developing countries, China's one-child policy means that there is not a demographic youth bulge, and its population will remain relatively constant in the next decades.⁴ However, rising levels of education and aspiration mean that young people in China are wanting to enjoy the benefits of this rapid economic growth and are consuming more than ever before. The motivations and attitudes of this group, and their actions and approach to buying cars will have profound local and global impacts.

There are nearly one billion cars on the road worldwide right now, and this is expected to increase to three billion by 2050.⁵ The largest growth in numbers of cars is expected in China. Between 2005 and 2010 the number of cars in China trebled from 21 million to 62 million.⁶ By 2025, China is expected to replace the US as having the largest number of cars, and estimates for 2030 suggest that there will be over 400 million cars on Chinese roads by that date. (Figure 1).⁷ China also now produces the most cars in the world, producing 18 million new cars in 2013.⁸

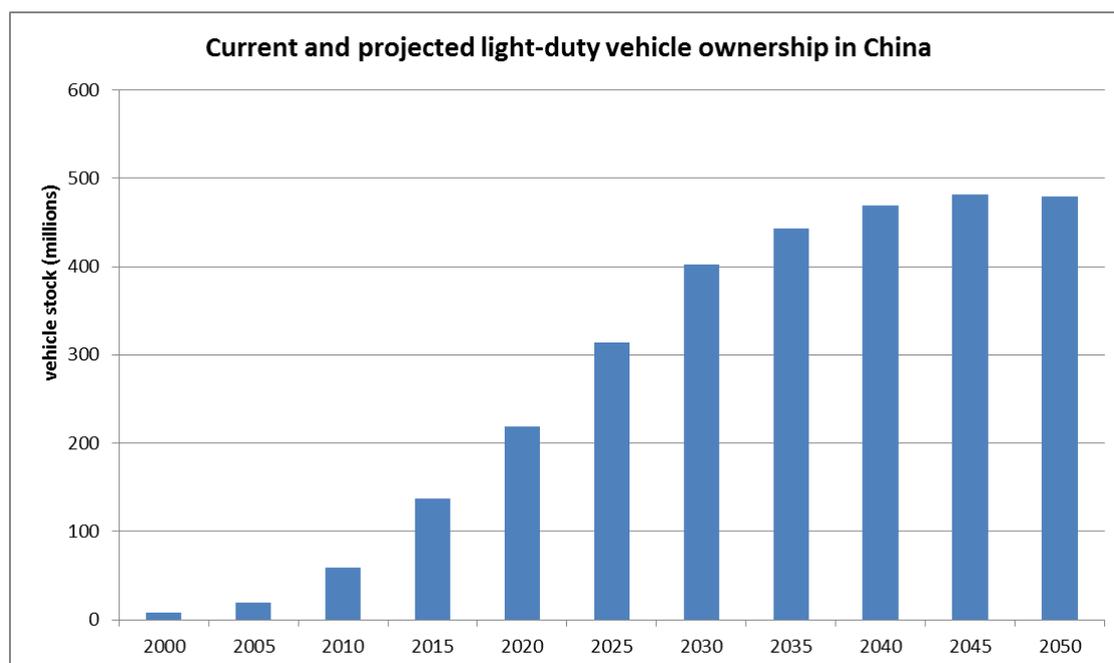


Figure 1 Source: ICCT roadmap

Currently, the average fuel economy of cars in China is 7.5 Lge (Litres of gasoline equivalent)/100km. Japanese cars, on average, use around a third less fuel to go the same distance (4.9 Lge), whereas cars in the US consume a fifth more (9 Lge).⁹ The transport sector globally is responsible for around a quarter of all carbon dioxide emissions,¹⁰ with road transport responsible for around 16%.¹¹ CO₂ emissions in China have increased from 0.4Gt in 2005 to 0.7Gt in 2012,¹² and forecasts suggest these will grow to 1.8 Gt in 2030.¹³

The World Health Organization estimates that 3.7 million people die globally every year from the effects of outdoor air pollution, much of it caused by the effects of road transport.¹⁴ China's former health minister has publically stated that annual deaths in China range from 350,000-500,000,¹⁵ while the Global Burden of Disease study estimates that this could be as high as 1.2 million with an additional 25 million healthy years of life lost.¹⁶ Air pollution is the 7th leading cause of death globally, but in China it is estimated to be the fourth leading risk factor.¹⁷ Safety is also a major issue as road accidents are a significant cause of death and injury. Every year over 275,000 people die as a result of road traffic injuries in China.¹⁸

For anyone seeking to address these health, energy and environment challenges in China, there is a real imperative to more fully understand how the values and attitudes of Chinese young people might be shaping their choices about personal mobility. It is in this context that FIA Foundation commissioned Cultural Dynamics Strategy and Marketing Ltd (CDSM) to research the prevailing values and attitudes of Chinese young adults.

CDSM's research examined the values and attitudes of 18-35 year olds in three Chinese cities towards car buying, car usage and transport preferences, as well as pollution and air quality. The research focused on 18-35 year olds as representative of a new generation who are likely to shape China's future over the next 30 years.

CDSM's approach uses a values survey to categorise the values of respondents into three groups, known as 'Settlers', 'Prospectors' and 'Pioneers'. Settlers are 'sustenance driven', predominantly associated with conformity; Prospectors are 'outer-directed', associated with competition; and Pioneers are 'inner directed' and associated with creativity – although equally these groups could be characterised by tradition, ambition and liberal ethics.¹⁹

CDSM's experience is that cultural and market changes usually begin with Pioneers, are then picked up by Prospectors and eventually adopted by Settlers. In more traditional societies, dominated by Settler values, typical of China before the recent past, change is slow to occur and is usually forced by restless Prospectors wanting more. Settlers have little influence over the values, beliefs, attitudes and behaviours of others – especially Prospectors.

The main findings of this research are:

1. CHINESE CITIZENS HAVE A VERY DIFFERENT RANGE OF VALUES THAN IS CURRENTLY TYPICALLY OBSERVED ELSEWHERE

CDSM use responses to a values-based questionnaire to divide respondents into three categories. In the UK there are approximately equal proportions of the population in each of these three groups ('Settler', 'Prospector', 'Pioneer'). In China the vast majority (over 80%) fit into just one category, 'Prospector'. This values profile is unlike any measured in other countries today, and is most similar to America in the 1950s and 60s. This trend was reflected in all three cities in the research; there was no significant difference in the values profile between cities.

2. CARS ARE SEEN AS 'DREAM MACHINES'

Materialism, consumption and looking good are important values for a high proportion of urban young adults in China. Within the Prospector group, over half can be further categorized as 'Now People'. This value profile is associated with a need for success and acquiring status symbols, consistent with viewing cars as 'dream machines'. This value profile is very different from those typically associated with humanitarian and environmental activism as well as traditional values.

3. CAR USE AND OWNERSHIP IS HIGH IN CHINESE CITIES, BUT PEOPLE STILL USE A MIX OF TRANSPORT TYPES

Most respondents said that they own a car and use one every day. However, they also use a variety of other modes of transport. Nearly as many as take the car (66%) take the underground (63%), around half walk and 40% take the bus as part of their daily activities. However, significantly more Prospectors own and use a car than the other groups.

4. ECONOMIC FACTORS CURRENTLY AFFECT CAR OWNERSHIP CHOICES. AFFORDABILITY IS HIGH IN THE LIST OF FACTORS THAT INFLUENCE PEOPLE'S DECISIONS, BUT STATUS AND EFFICIENCY ALSO MATTER.

Cost factors are still the most important factor when considering buying a car. Over 50% of respondents identified either the 'cost of buying' or the 'cost of running' as the factor that they found most off-putting. However, although this is a factor in their decision-making, it does not put people off completely. Most car-owning respondents have a small car – about 1.6 litres, and give a range of responses to what choices they would make in future vehicle ownership. Around a third say they want another car (but don't specify any characteristics), with a further third saying they would like a higher status car, and a final third saying they would want a more efficient car.

5. PEOPLE RECOGNISE ENVIRONMENTAL ISSUES RELATING TO TRANSPORT, BUT STILL WANT TO OWN CARS

Young adults in China understand the cause and effect of cars and pollution and the connection between that and climate change. Both air pollution and traffic are widely seen as real problems, with slightly more people agreeing congestion is a problem in their city (85%) than air pollution (79%). Almost 70% of respondents believe that climate change is happening. However, people appear unwilling to change their individual behaviours. Most notably in this context, most people who don't currently own a car want one.

6. PEOPLE LOOK TO GOVERNMENT TO REDUCE AIR POLLUTION AND CONGESTION

There is widespread appetite for better public transport, and for policies to reduce air pollution and congestion. However, few see this as their individual responsibility, with the highest proportion - 47% - seeing this as Government's responsibility, and just 9% who think it is car owners' own responsibility.

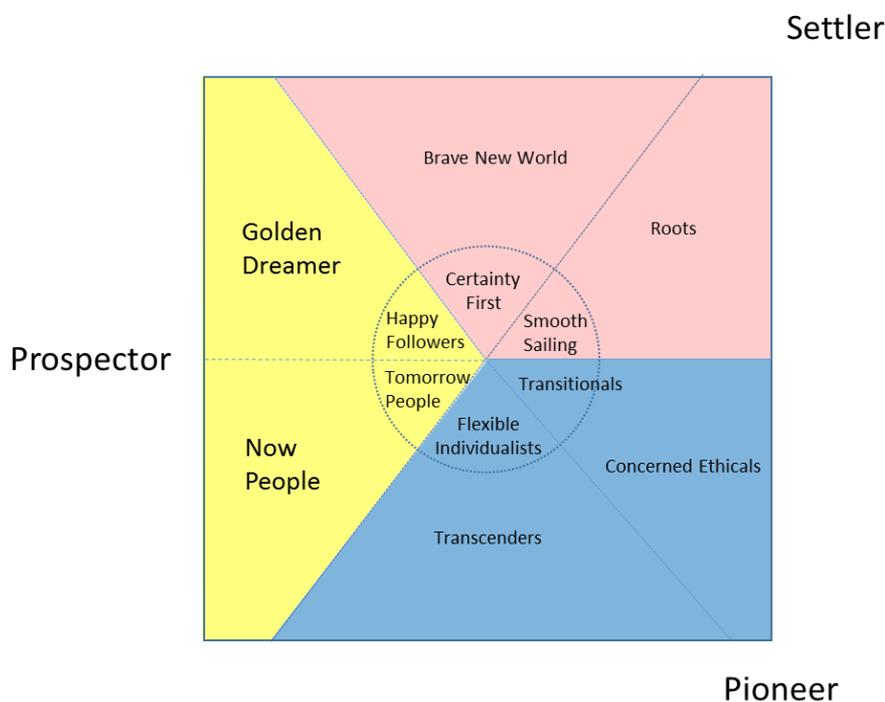
Although Golden Dreamers are less likely to believe in Climate Change, they are the group most likely to agree that congestion and air quality are major issues and to support policy interventions, significantly more so than the Now People group. However, their values profile also means they are less likely to be the first to change their own actions, and they are in any case relatively few in number in this cohort.

BACKGROUND

CDSM employ a unique methodology, the Cultural Dynamics Values Survey, to help understand the motivations and ‘unconscious drivers’ that influence human behaviour.

The Cultural Dynamics Values Survey uses 10 values-based questions (which respondents have to rate on a scale of 1 – 5). In addition, the research asked 21 paired statements to provide further insight into the respondents’ values set.

The Cultural Dynamics model divides the population into three groups based on their responses. These are described as ‘Maslow groups’, and are based on the psychologist Abraham Maslow’s ‘hierarchy of needs’ theory,²⁰ as well as subsequent work by CDSM and others to use such values to map and characterise culture. These groups are labelled ‘Settlers’, ‘Prospectors’ and ‘Pioneers’. Within these three groups, a further categorisation is possible into four further sub-groups, or ‘Value modes’, giving a total of 12 categories.



These groups are themselves based on a more complex subset of values ranging from Tradition, Conformity, Security, and Power, to Achievement, Hedonism, and Stimulation, and Self Direction, Universalism and Benevolence. This model is supported by academic research in over 100 countries and CDSM’s own research over the last 10 years.

The research was undertaken by GMI (Global Marketing Insite) using their panel of Chinese respondents in three Chinese ‘tier one’ cities; Beijing, Shanghai and Guangzhou.²¹ The survey measured demographic variables of 1) Age 2) Gender 3) City 4) Highest level of education 5) Monthly income 6) Employment status. The research was first carried out in August 2013, and the values survey was repeated in November-December 2014.

The survey was sample was balanced equally between the 18-25 and 26-35 age groups and between male and female respondents. In total, the 2013 survey included 2005 people.

A series of further questions were asked to understand Chinese young people’s vehicle use and attitudes towards transport options and policies:

- A. Type of vehicle owned
- B. Type of main car owned
- C. Vehicles people would like to own
- D. Factors considered when buying a car
- E. Factors that put people off buying a car
- F. Attitudes to fuel consumption
- G. Estimated income needed to run a car – non-owners only
- H. Methods of daily transport
- I. Attitudes to issues of traffic congestion and air pollution
- J. Responsibility for air pollution in your city
- K. New transport policy ideas

The values survey was repeated in 2014 in order to further validate the findings and measure any changes in values over the past year. This involved a larger sample, of 1,000 in each city, with the same age and gender splits. The questions about attitudes and behaviour towards transport were not repeated. CDSM state that from experience, these are unlikely to change in a year and are best reviewed on a 3 year cycle.

The research was carried out in Shanghai, Beijing and Guangzhou, three of the largest and most important cities in China.²² These cities are likely to be at the leading edge of change in the country, and in many ways already set and shape the path for other parts of the country. They have each already introduced restrictions on car ownership in an attempt to improve air pollution and congestion.

SHANGHAI

- Shanghai is one of the biggest cities in the world, with a population over 20 million.²³ It sits at the mouth of the Yangtze River on China's eastern coast.
- There were 2.1 million cars in Shanghai in April 2013. Shanghai has had a vehicle registration system since 1994, which involves a monthly auction system that gives car registration rights to the highest bidder. In December 2013, the Government revised the system and announced that it would only be offering 100,000 license plates for 2014 in total.²⁴
- Shanghai has a modern and well developed subway system, which used by over 8 million people every day,²⁵ and is over 400km long.²⁶



BEIJING

- Beijing in the north east of the country, is the capital of China and has a population of over 16 million.²⁷
- In April 2013, there were 5.2 million cars in Beijing. The city's vehicle registration system was introduced in 2012, and involves a lottery, known as 'Yaohao' which gives new car buyers the opportunity to win a free car license. It offered 240,000 license plates a year from 2011 to 2013, but cut the quota to 150,000 in 2014 to keep the number of cars below 6 million by 2017.²⁸
- Beijing has a modern subway system, which is 465km long and which nearly 10 million people use each day.²⁹



GUANGZHOU

- Guangzhou is the third largest city in China and the largest city in south-central China, with a population of over 11 million.³⁰ There were 2 million cars in the city in April 2013.³¹
- The city has introduced a mixed system, with three opportunities to obtain licenses. The first is an incentive for environmentally friendly cars which allocates around 10% of the available licenses to cars that meet certain criteria. 50% of licenses are available through an open lottery, similar to Beijing – although the largest vehicles are excluded from this system. In addition, 40% of vehicle licenses are auctioned, with no limit on the price.³²
- Guangzhou also has an underground system, which is 260km long and used by nearly 6 million people each day.³³



FINDINGS

1. Chinese citizens have a very different range of values than is currently typically observed elsewhere

The majority (81%) of the 18-35 year olds who were surveyed across the three Chinese cities fit into CDSM's 'Prospector' value group. These results were consistent across all three cities, and for male and female respondents. 14% of respondents were 'Pioneer' and just 5% of the population were 'Settler' (Figure 2).

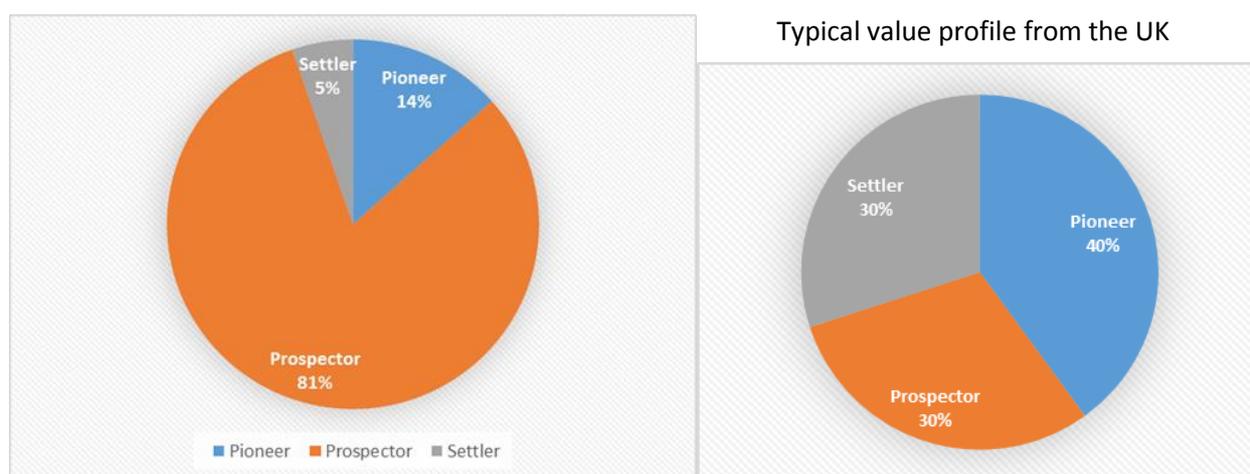


Figure 2

This profile of responses is completely different from the responses that CDSM has observed in the UK and the US, where Pioneers are typically the largest group and only around 30% of the population would fit the Prospector category. However, this profile is consistent with other research that CDSM has undertaken in China. Their previous National Values Survey in major cities in China showed that over 74% of the adult population (not just 18-35 year olds) were Prospector, with the remainder evenly split between Settlers and Pioneers. From this work, CDSM describe the groups in the following way:

- Prospectors are the group that most closely reflects post-war America and the rise of the consumer society – illustrating a new confidence and rising expectations. It is also similar to values that drove the larger European countries from the 60s to the 80s. They want 'more' and believe that they could achieve it through individual endeavour. They drive the changes in society that have created more wealth for more people than has occurred in the lifetime of their parents.
- Pioneers are more likely to be working in low paid entry level positions, full and part-time or in education prior to working. They could be characterized as being like the anti-establishment youth that brought changes to American and British societies in the 50s and 60s, but with a particularly Chinese twist.
- Settlers are those who have been left behind by this electric growth and rapid social change. They usually have incomes generated from subsistence level self-employed businesses or variable income manual labouring jobs – and are struggling to survive in comparison to others. They are normally over represented in the retired population.

To further verify these results, CDSM repeated the survey for FIA Foundation in 2014 with 18-35 year olds. This research confirmed their findings with nearly 90% of respondents in the three cities fitting this 'Prospector' category (Figure 3).

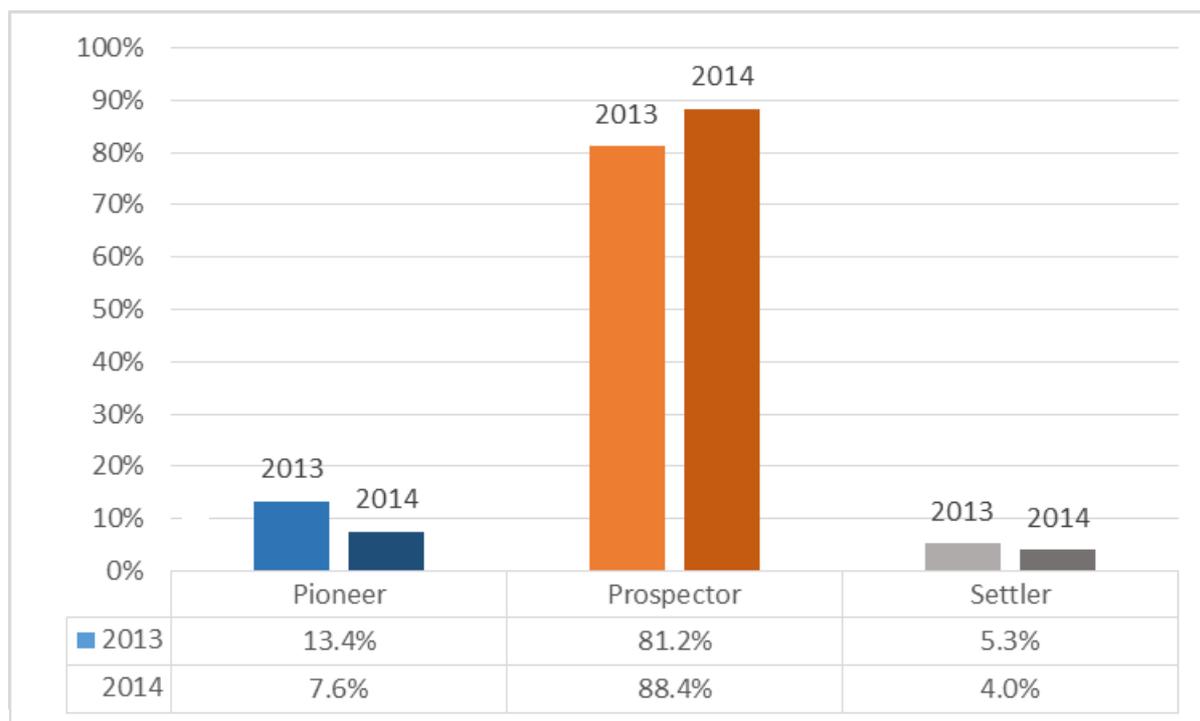


Figure 3

Economic and social factors may also shape people’s values and attitudes to transport choices. The responses of young adults in the three cities show that:

- Prospectors tend to be economically active in steady work.
- Pioneers are over-represented among students, and are least likely to have a full-time job.
- Settlers have lower educational attainments than average, and not working or working part time. Settlers are over-represented in the oldest age category (31-35).

These differences are also reflected in their average monthly income (Figure 4). Whilst Pioneers, Prospectors and Settlers appear across the income mix, only around a quarter of Prospectors have incomes of less than 5000 RMB/month, compared with nearly half of Pioneers and Settlers. However, it is worth noting that the sheer number of Prospectors means that there are large numbers in every income category.

There is no significant difference in the values profile of respondents across the three cities. There are some differences in other characteristics in responses – for example, Beijing has a higher proportion of very high earners, whereas average incomes in Guangzhou are lower. A higher proportion use cars in Beijing with the proportion lowest in Shanghai. Beijing also has the highest bicycle ownership and use, whereas a higher proportion take the bus in Guangzhou. It isn’t possible to unpick all the factors that affect these trends in this research, which could also include differences in geography, income or the impact of different local policies.

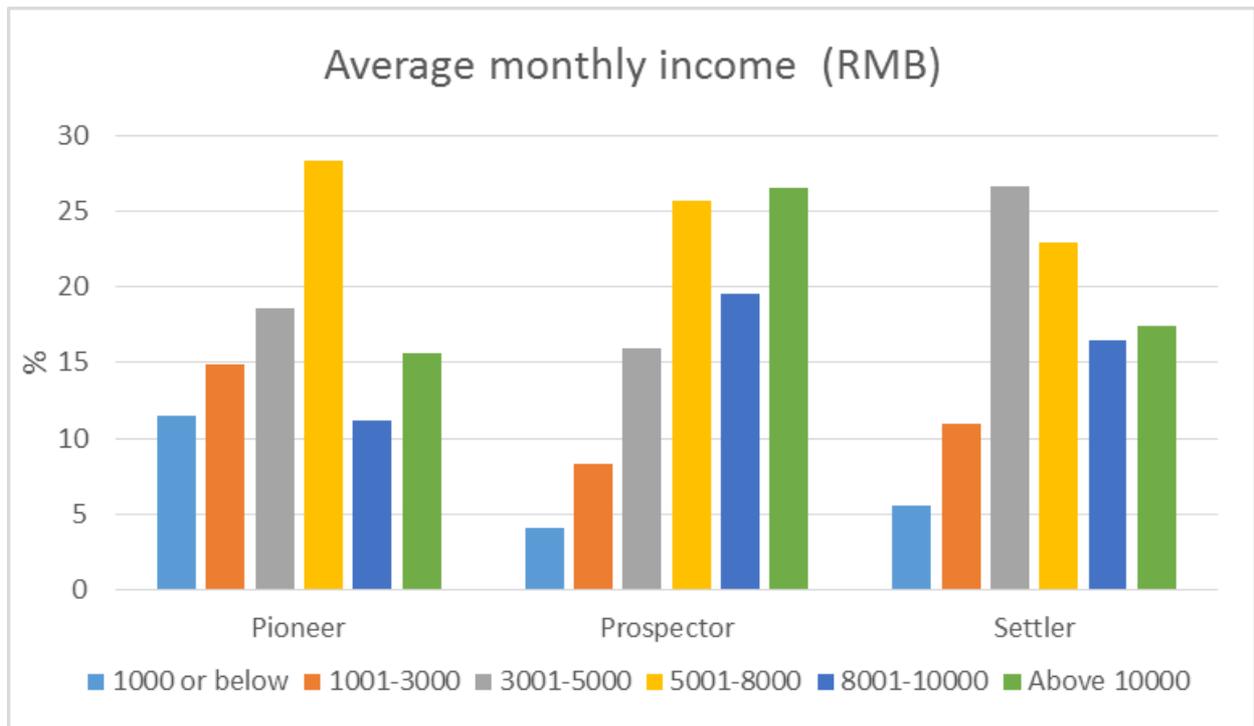


Figure 4

2. Cars are seen as ‘dream machines’

Over 80% of respondents fit a ‘Prospector’ value profile, which is associated with a need for success and acquiring status symbols. In CDSM’s model, each of the three values groups (Settler, Prospector, Pioneer), can also be further categorised into four sub-groups, or ‘Value modes’. In the Prospector Group the two most important Values Modes in this survey both by size and explanatory power, are ‘Now People’ and ‘Golden Dreamers’. ‘Now People’ display highly materialistic and impulsive values, and this group are particularly likely to view cars as ‘dream machines’.



Now People make up 45% of all respondents (55% of all Prospectors) and the Golden Dreamers make up 24% of all respondents (30% of all Prospectors) (Figure 5). These two very large groups make up over two thirds of all people in the research and almost 85% of all Prospectors. CSDM’s research has shown that whereas Golden Dreamers tend to be more traditional and seek the approval of others, Now People are more independent minded and driven by self-esteem. The other two Values Mode for Prospectors; ‘Tomorrow People’ and ‘Happy Followers’ are less important, both numerically, but also as CSDM’s experience has shown that these groups are less likely to manifest attitudes and opinions in a consistent manner.

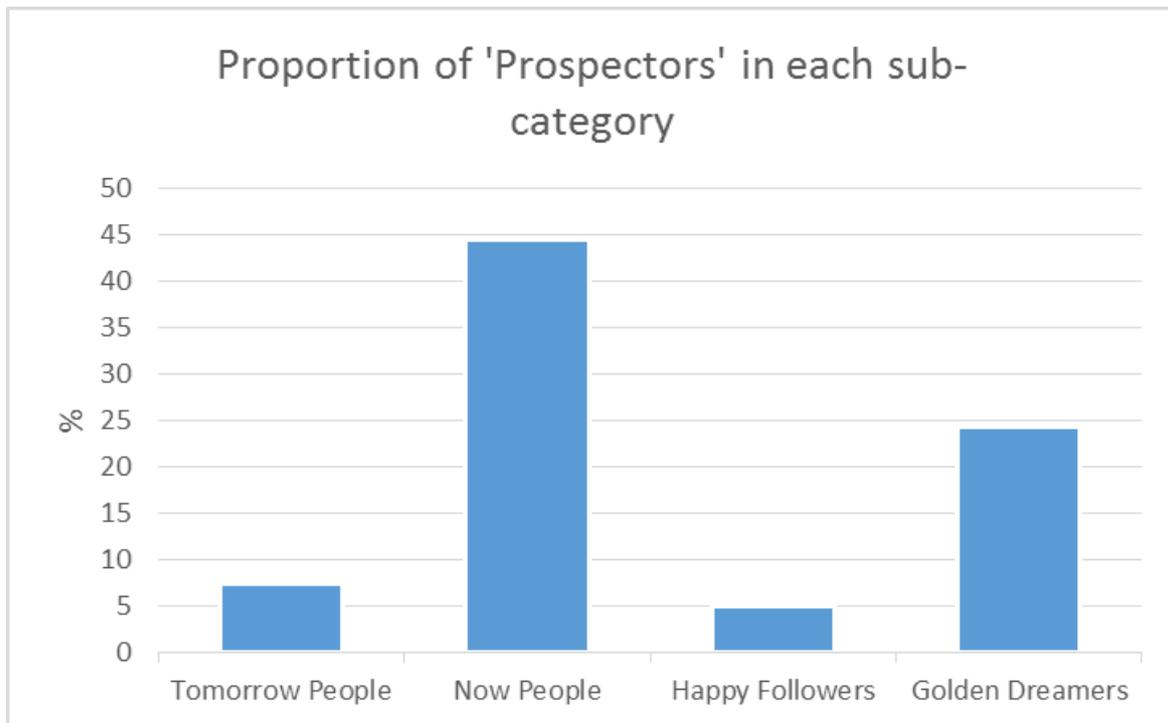


Figure 5

CDSM conclude:

- The 'Now People' Values Mode segment of the age cohort is the most materialistic and physically adventurous of any group in China today. It covers people wedded to the psychological need to "identify, acquire and display symbols of value", in their drive to gain the esteem of others. Simply put, they want the world and they want it now. Living in an optimistic frame of mind and feeling better about themselves than earlier times in their life they want to experience any and everything, and have little to no time for restrictions on their freedom to do what they want to do. Though aware of environmental issues, both in their city and in the world, they are loath to make changes in their life style that are driven by factors like sustainability and ecological awareness - but are likely to want others to change theirs. Now People are more self-efficacious and optimistic and will tend to push the boundaries of acceptable/conservative public behaviour – much more so than any other group in any society.
- 'Golden Dreamers' are more focused on gaining wealth and power than the Now People and likely to be more rigid in what is proper and what is not proper – for others. They themselves will be more traditional in their attitudes and behaviours than the more vigorous and fun loving Now People.

The profile of 44% of young urban dwellers categorised as 'Now people' is unlike anything CDSM has measured anywhere in the world. CDSM characterise Now People as seeing cars as 'dream machines'- a potent symbol of value, and suggest that they are unlikely to want to give up their cars. This has implications for communicating with Chinese consumers, and how likely they will be to change their behaviours. They conclude that:

- "There is a cacophony of competing values amongst Chinese young people, yet with an underlying consensus that life is better today and probably even better tomorrow.
- This surge of pragmatic optimism leads to often conflicting views of what is best for themselves as an age cohort and also for the future of their society and the limits to authoritarian or centralized planning. They are as likely to reject the established ways (often corrupt) as they are to enter willingly into a range of corrupt practices themselves. They are pragmatic first, last and

always. There is little room in their optimistic world for the morals and/or ethics of past and future generations.

- The nature of this optimistic, materialistic and pragmatic group is to always look around and see what others are doing. They are not the same as their more individualistic counterparts in other countries. The Chinese Now People (the main group observed in the responses) are more likely to want the 'safety' of the big brand when buying most products. In the West the Now People are looking for the peer-group esteem that comes from being the 'first' to buy a well-known brand. This means that once the Chinese Now People identify a brand or behaviour that brings esteem of others and is sufficiently 'safe' they will change their behaviours very quickly. This means that markets and ideas are likely to change rapidly once something becomes 'the new safe and cool'.
- Now People are more likely to seek self-esteem, whereas Golden Dreamers are more likely to seek the approval of others. This makes Now People more likely to be 'fast followers', whereas Golden Dreamers are more likely to be 'conservative followers'."

The majority of the population therefore show a strong tendency towards instant gratification of material and emotional desires, and they are unlikely to want to give up their cars.

3. Car use and ownership is high in Chinese cities, but people still use a mix of transport types

The research explored vehicle ownership and transport use to see how people choose to get around the city in their daily life. Most respondents (71%) own a car (Figure 6). This is highest amongst the Prospector group (76% of Prospectors own a car compared with 50% of Pioneers and 55% of Settlers). Currently a higher proportion of men than women own a car (75% of men own a car, compared with 68% of women). Only around 12% of respondents don't own any vehicle.

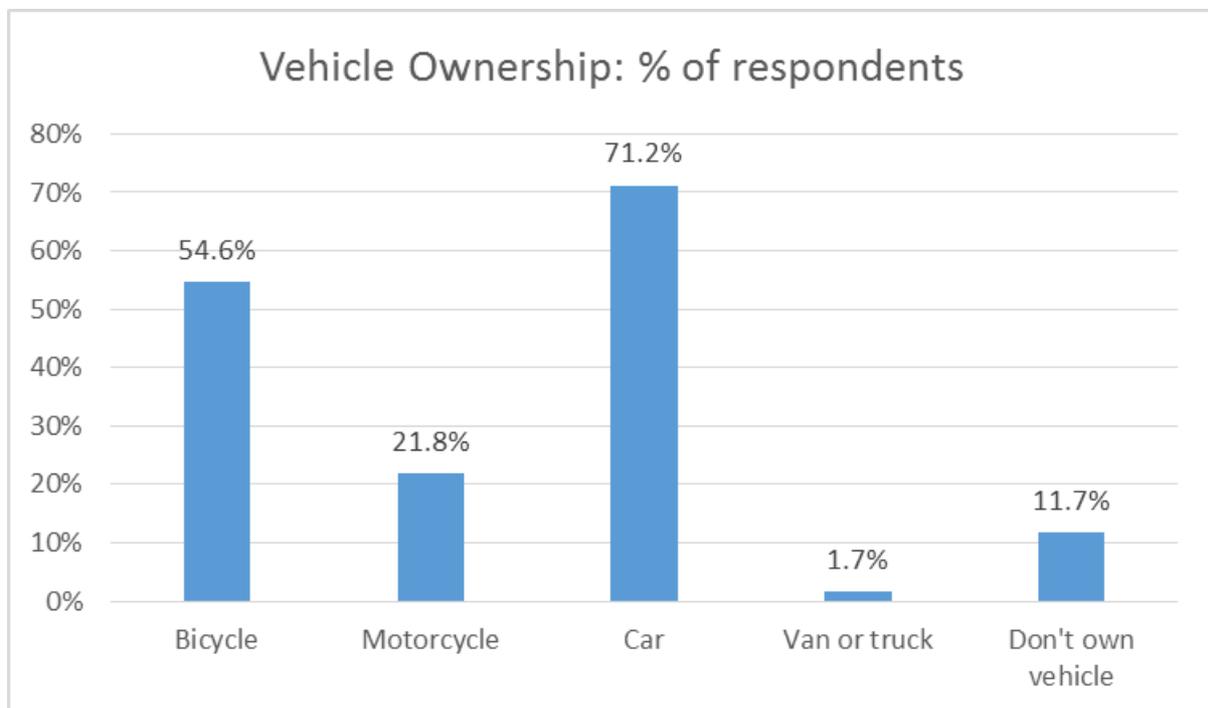


Figure 6

Note: Some people will have more than one vehicle so figures will add up to more 100%.

The majority of respondents (66%) use cars to get around on a daily basis (Figure 7). Again, this figure is far higher among Prospectors. 69% of Prospectors use a car, compared with 52% of Pioneers and 51% of Settlers. 74% of the 'Now People' sub-group use a car for their daily activities, the highest of any group.

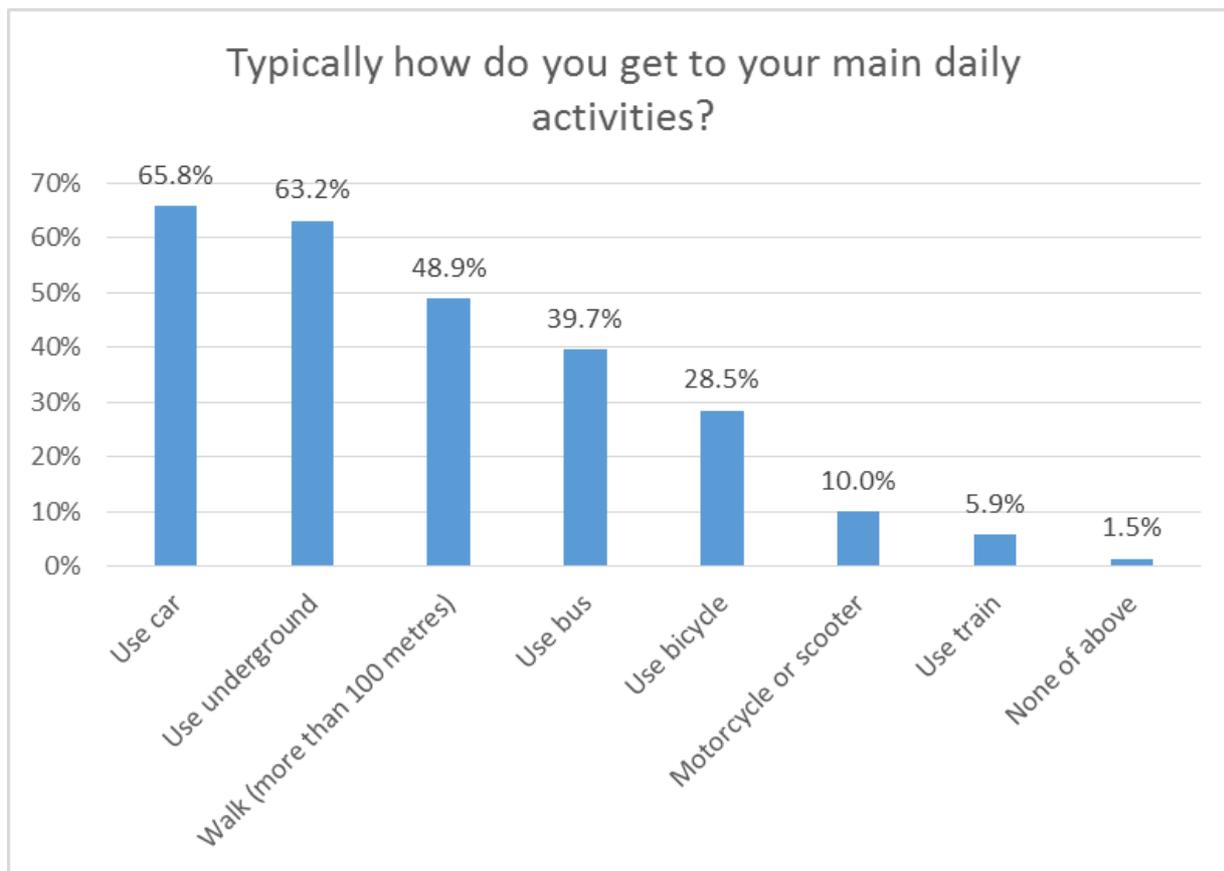


Figure 7

Most people also use forms of public transport on a daily basis – often in conjunction with a car. Most people take the underground for at least some of their journeys, and there is little difference between cities, although 68% of women use it, compared with 57% of men. Almost 40% of respondents use the bus in their daily activities and large numbers walk, cycle or use a motorcycle. This shows that in the three cities in the research, there are a range of transport options, and people use a mix of them.

4. Economic factors currently affect car ownership choices. Affordability is high in the list of factors that influence people’s decisions, but status and efficiency also matter

When asked their top priorities when buying a car, the three highest priorities that people reported were: affordability to buy (28% chose this as their top priority), reliability (21%) and affordability to run (20%). 17% chose “It cause less pollution than other cars”, whilst 14% chose “It looks good and matches my personality” (Figure 8).

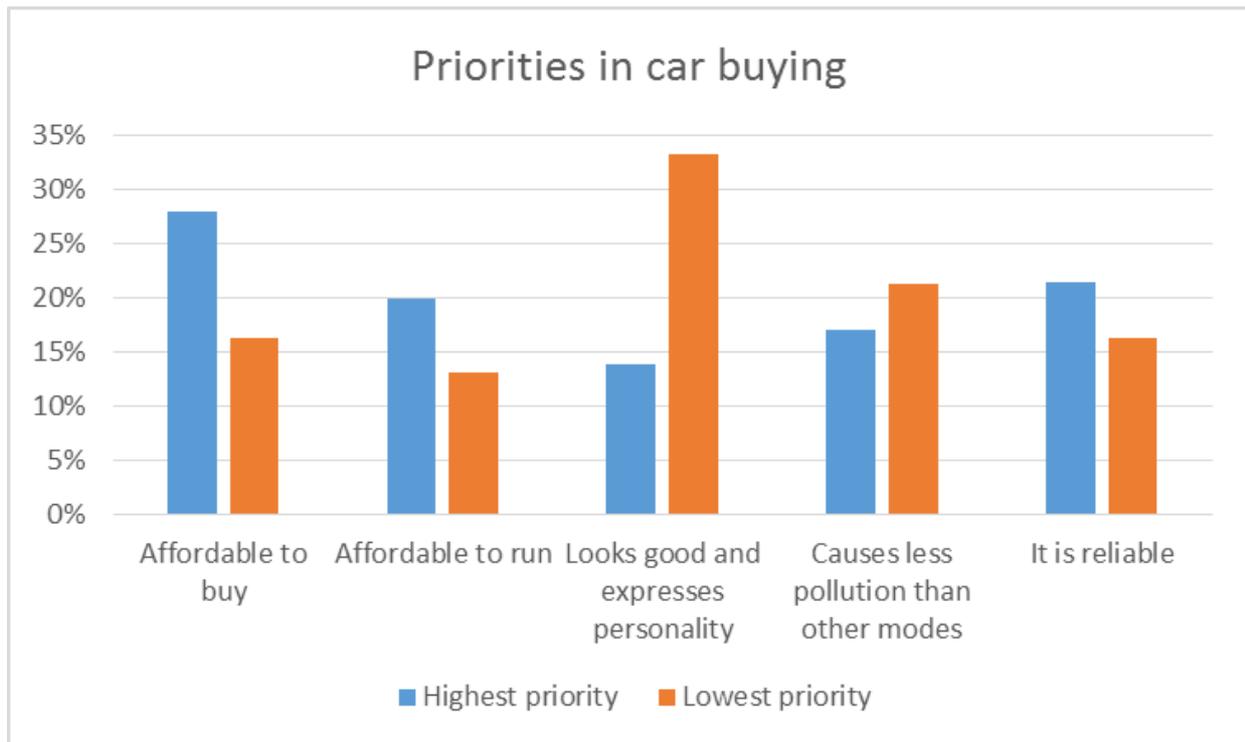


Figure 8

Affordability was more important for younger respondents than older ones (42% of the 18-19 age group chose this as the top response, compared with 23% of the 31-35 age group). However, reliability was more important for older respondents (29% of 31-35 year olds chose this compared to 18% of 20 to 25s).

In a survey, where people are asked to give rational responses, it is perhaps not surprising that most people state that affordability and reliability are important factors in their decisions. In reality, there may be many factors that affect people’s purchasing behaviour, including colour, shape and marketing messages. More interesting in this research, are the 14% who stated that looks are their top priority. 16% of Prospectors chose “It looks good and matches my personality” first, whilst just 6% of Settlers and Pioneers chose this first. As would be expected the Now People are almost 50% more likely to choose this option compared to the rest of the Values Modes.

Again, cost factors were also the top factor selected that people said put them off when considering buying a car (Figure 9). Over 50% of respondents replied that the ‘cost of buying’ or the ‘cost of running’ a car put them off. People’s responses also suggest that congestion is generally a bigger consideration than pollution or the availability of parking. There are some differences between cities; People in Beijing

are more concerned about the status and looks of their cars, whereas this is less important in Shanghai. Regulations also prevent a higher proportion of people in Beijing than other areas from buying cars. Traffic congestion and pollution are more likely to be seen as an issue in Beijing than Guangzhou. However, cost is more of a factor in Guangzhou.

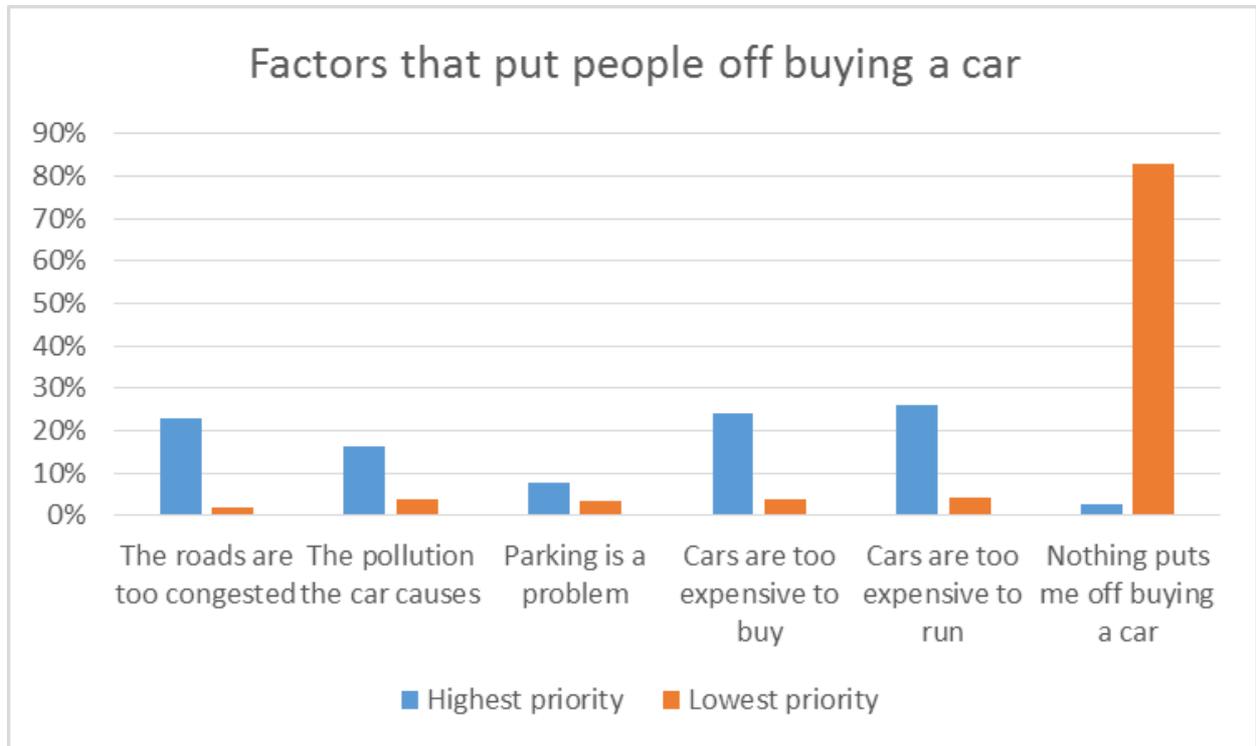


Figure 9

The affordable to run option is interesting as a lower proportion of Now People than other groups select this choice. They are the type of people who will sacrifice other activities and expenditures in order to be seen in their car and in the places their car can take them. This orientation towards cars and houses, the things that provide their social image to others - and the demands they place upon themselves to maintain the image - is commonplace among the Now People worldwide.

There are a range of different sizes of car owned by respondents (Figure 10). Currently only 10% of car-owning respondents own the smallest car (a city car – less than 1.0 litre). The highly status conscious Now People are the most under represented on this smallest type of car, with only 7% owning one. Most (49%) car-owning respondents have the second category (small car around 1.6 litres). 32% of car-owning respondents have a family car – about 2.5 litres. 94% of vehicles are petrol, with very small proportions reporting diesel (3%), hybrid (2%) and electric vehicles (under 1%). This suggests that cost or other factors are generally encouraging people to choose smaller cars.

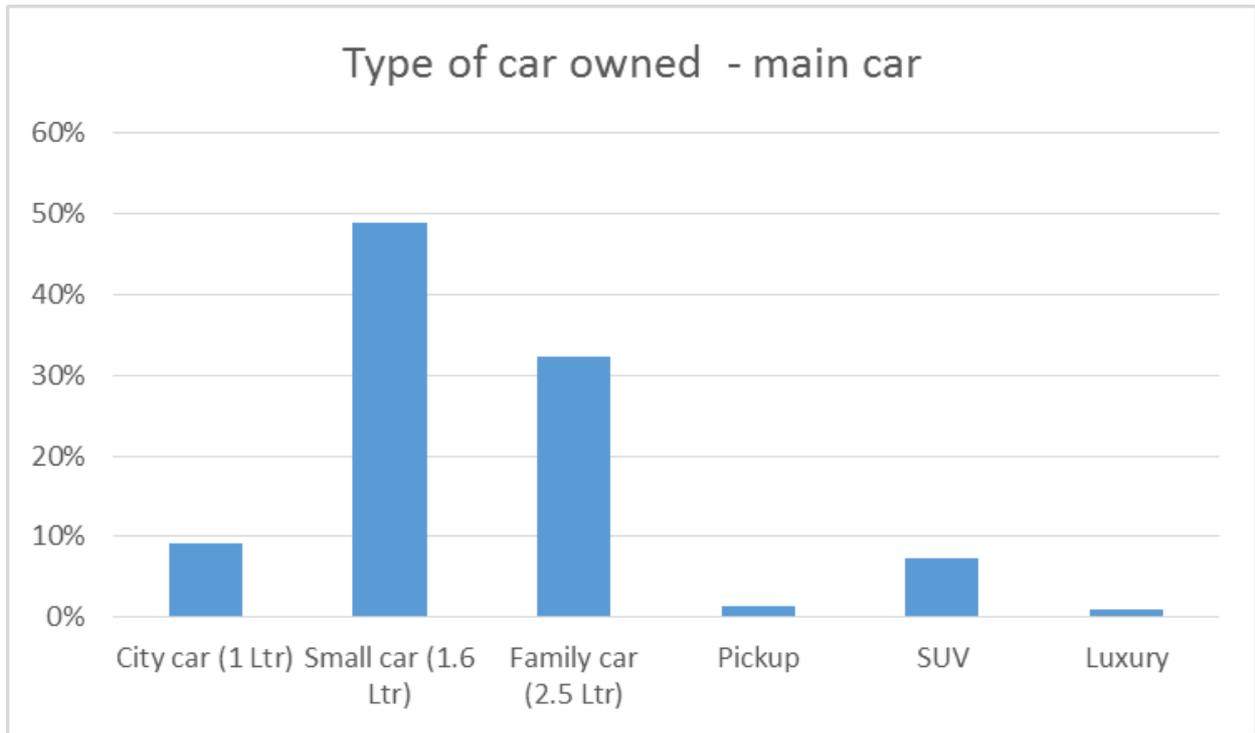


Figure 10

People who currently don't own a car, van or truck were asked how much they think people need to afford one. Most respondents thought that they would need an income of at least 5000 RNB a month to be able to afford a car, with 72% stating that they would need at least 8000 RNB, and 39% stating over 10,000 RNB. Around a third of all respondents earn less than 5000 RNB a month, which is a similar proportion to those who do not own a car. Only 5% said that they did not want to own a car.



When considering future vehicle purchases, an almost exactly similar number of owners say they want a more efficient vehicle than they own now (Figure 11). Efficiency may have to do with reducing the cost of motoring, or it may have to do with reducing the local pollution produced by the current vehicle, or possibly even an awareness of the impact of inefficient engines in producing greenhouse gases. The fact is that these economic and environmental factors are almost exactly matched by those who say social esteem is important.

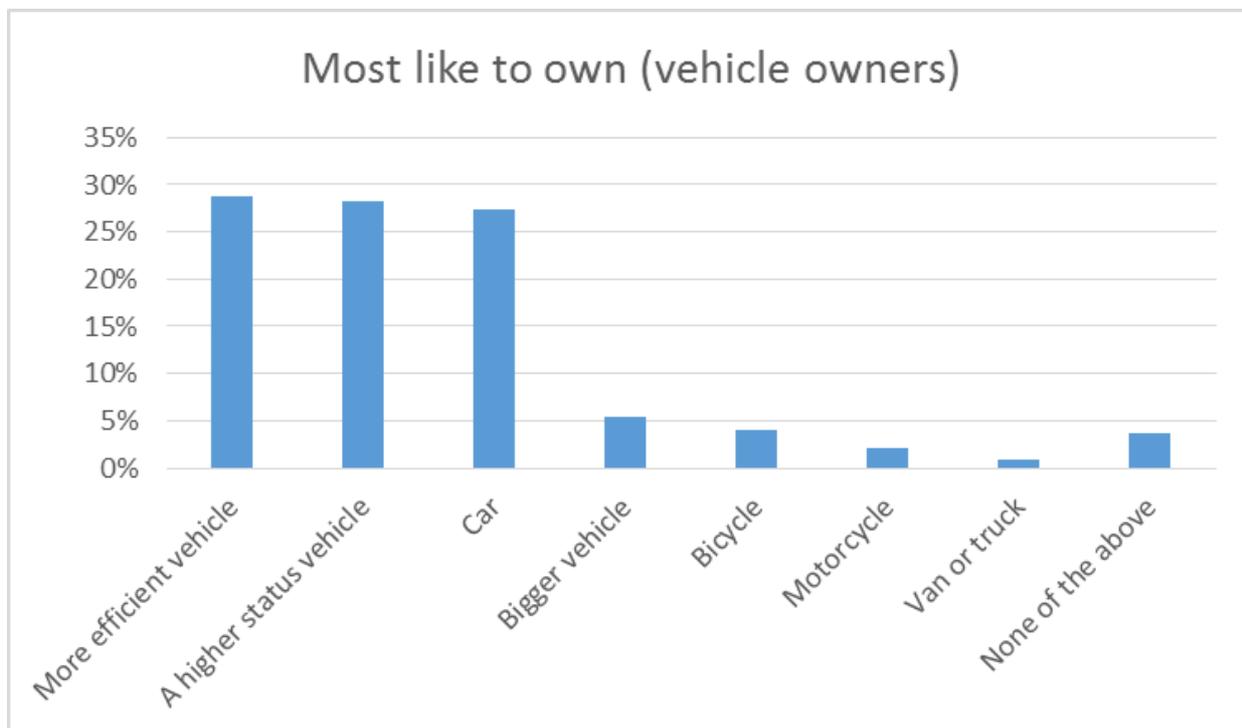


Figure 11

One of the prime factors in running a car is the cost of fuel. Only 6% say they do not care about fuel consumption. However, only 36% find the information supplied about fuel consumption helpful. 42% say they do care about fuel consumption but sometimes the information supplied is not very clear and a further 15% do not trust the information supplied.

These results suggest that even though status and material ambition are very important to a large proportion of the population, economic concerns also play a role in their decision-making. It may be because these people ‘want it all’, and therefore want to spend as much as they can on different things. However, Now People are less likely than most to be put off by economic factors.

5. People express concern about environmental issues relating to transport, but still want to own cars

Young adults in China understand the cause and effect of cars and pollution and the connection between that and climate change. Both air pollution and traffic are widely seen as real problems, with slightly more people agreeing congestion is a problem in their city (85%) than air pollution (79%) (Figure 12).

70% of respondents disagree with the statement “Climate Change – I don’t believe in it”. In other words they believe in climate change. This is a question that CDSM has posed in ten countries in recent years and these younger Chinese people show a similar pattern of response to the global norm. This is true even in the more materialistic and impulsive groups (75% of Now People agree that cars are a significant cause of climate change). Just telling Now People there is a problem with their behaviour does not mean they will change it, especially if the reasons are linked to long term issues like climate change. They will change behaviour only if there is a perceptible short term or immediate benefit to them and their need for esteem of others.

There is consensus that improved public transport and less use of private cars would lead to benefits. Over 80% of all groups agreeing that three questions dealing with fewer cars, more public transport and more investment in public transport. 75% of all respondents agree that “A significant cause of climate change is the petrol and diesel used to fuel cars”.

The Golden Dreamers are most likely to agree with the ‘less cars, more public transport’ options than all other groups. This clear opinion will act as a benchmark for politicians and policy makers in the coming years. However, the fact is that most people are aware of the choices and accept them but still use cars.

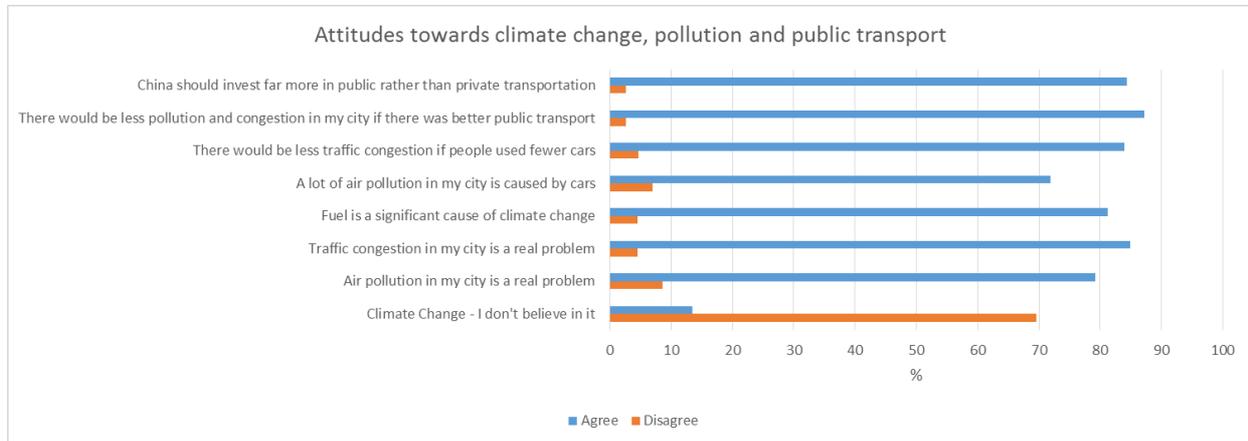


Figure 12

6. People look to government to reduce air pollution and congestion

There was wide support for most of the options that were presented for improving transport in cities (Figure 13). Out of the nine options presented, over 90% of respondents thought that six of them were good ideas (more public transport, subsidies for electric vehicles, subsidies for smaller engines, higher taxes on most polluting engines, banning the most polluting engines). In addition, over 70% thought removing tax from public transport was a good idea, and over 60% of people thought continuing to increase vehicle fuel tax was a good idea. The only option which more people thought was a bad idea than good was putting up the price of petrol/diesel – over two-thirds thought this was a bad idea. China’s fuel prices are fixed by the National Development and Reform Commission (NDRC).³⁴

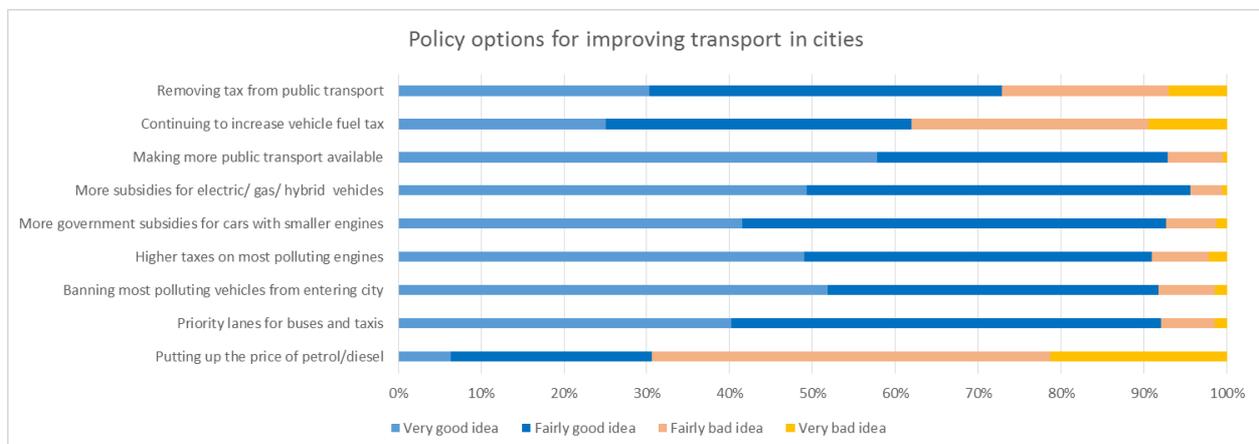


Figure 13

There is widespread appetite for better public transport, and policies to reduce air pollution and congestion. However, few see this as their individual responsibility, with the highest proportion seeing this as Government’s responsibility (Figure 14). 47% of all respondents think “the Government” should be most responsible for cleaning up the air quality in their city. 17% of the survey respondents chose the “Car makers” as being most responsible for cleaning up the air quality in their city, 19% chose oil companies. 8% chose the option with the least support – coal power plants. Only 9% chose “Car owners”.



Figure 14



These results are interesting in the context of Chinese vehicle policies in the past few years. In February 2013, the Chinese government introduced a series of steps to improve the quality of fuel, including reducing the sulphur content of fuel to 10ppm by the end of 2017, although cities including Shanghai and Beijing already have these high quality fuel standards in place.³⁵ The Chinese Government has also been promoting more efficient and cleaner vehicles through a series of subsidies.³⁶

CONCLUSIONS

This research into the values of Chinese young adults has opened up a new way of understanding attitudes to transport and personal mobility amongst this key group. China is a country that is confident, outgoing and materialistic, with an overriding exuberance. Yet it is precisely this approach which is destroying the quality of its urban environment and ultimately its desired lifestyle.

The responses show people who are individually ambitious and aware of the challenges that they face in areas such as congestion and air quality but unlikely to change their own behaviours. A high proportion currently own a car, and more would like to. However, most people are still cost conscious.

Young people in Chinese cities are a major force for fairly rapid small changes in attitudes and behaviours. They are likely to back away from change that overturns the status quo, but will be attracted to small changes that increase their chances to acquire wealth and power. Prospectors currently dominate the discourse and are resistant to the influence of Settlers and only faintly cognizant of Pioneers. Change will be driven by new ways of Prospector thinking and behaviour. Pioneers' influence will be minimal today – but could be radical in terms of framing new options to today's issues.

Policies that force this behaviour to change will be welcomed most by the Golden Dreamers. It is likely the Golden Dreamers will be movers and shakers in the drive to cut congestion rather than the Now People. The Golden Dreamers' need for control could be a real asset if they decide to take ownership of this issue. However, the indications are that the Now People, the ones most likely to want to be seen to be successful and to be admired by others, are not especially receptive to changes in their current behaviour even when their lives may depend on it, i.e. pollution causing bad health and traffic congestion leading to stress and a general loss of quality time in their lives. Policies that force this behaviour to change will be welcomed most by the Golden Dreamers.

In communicating to Now People, is likely that triggers based on personalized, limited and achievable objectives focused on 'improving the quality of your life' will be much more successful than more strategic, longer term appeals to their nascent social consciousness. Although individuals may be less likely to take individual action, they also recognise the role of government in tackling these issues.

A key message for groups seeking to mobilise Chinese young people to bring about social and environmental change is that appeals to social solidarity or ethics are unlikely to impact peoples' actions. Status, affordability, convenience, control, and fun are factors that have more power to affect people's transport behaviour.

The striking value placed on car ownership alongside likely projections for population and economic growth in China, create a real local and global policy challenge to ensure environmental sustainability.

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