

AUTOTECHCAST



2006 Spring Wave 2 Report US Consumer Advanced Automotive Technologies Report



- ❑ AUTOTECHCAST – An annual two-wave, multi-client study platform to collect and analyze consumer insights on 60 advanced automotive technologies. This study provides extensive demographics, technology adoption and technology-specific data & analysis.
- ❑ Surveys completed by over 30,000 U.S. consumers in Fall and Spring waves by Harris Interactive's Automotive Insights sub-panelists and Harris Poll Online members (Spring 2006 Wave 2 sample size is 12,857).
- ❑ Advanced technologies compiled from OEM & supplier client questionnaire in April 2005.
- ❑ AUTOTECHCAST survey length: 20 to 25 minutes.
- ❑ A Qualified respondent is 18 years of age, a US resident, owns or leases a vehicle, has a valid driver's license, has at least one household vehicle, owns a listed North American model – 2001 or newer, and is at least 50% involved in the decision to buy their next household vehicle.
- ❑ Data Collection Period (Spring 2006 Wave 2): May 15th through June 2nd.
- ❑ Weighting – data are weighted by demographics and propensity to ensure that respondents are representative of the total in-market vehicle buying population.
- ❑ Pricing Analysis – AUTOTECHCAST utilizes the Van Westendorp Price Sensitivity Meter. Consumers' willingness to pay is calculated using four pricing metrics that capture the price at which the consumers believe to be too expensive but would still purchase, the price at which the consumer believes the price is too expensive and they wouldn't purchase, the price at which the consumer believes to be a good value, and finally the price that consumers believe to be too cheap. Technologies were assigned one of two price ranges that respondents were required to choose within. The price ranges were \$50-\$1000 and \$50-\$5000 depending on the technology.



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One Touch Up Power Windows (including anti-trap feature)

Functionality: One touch up power window systems allow one-touch driver control of all windows. This system uses advanced electronic controls requiring only a single touch from the driver to close the window and does not require holding the button down the entire time. This feature also enables remote up and down control of vehicle windows and can be controlled by a key fob. The advanced electronics also enable anti-pinch technology which senses an object in the path of the window, and immediately reverses direction.

Benefits: Increased driver convenience and safety. With the addition of anti-pinch function there is a reduced potential hazard to children. One touch also reduces the time the hands are off the steering wheel, a convenience and safety feature when traveling through toll booths and drive through windows. Electronic controls allow remote actuation of the windows, if for example, it starts to rain, you don't have to be in the vehicle to control. When the vehicle is unattended, sensors could automatically put the windows up if rain is detected, or lower slightly if the interior gets too hot.

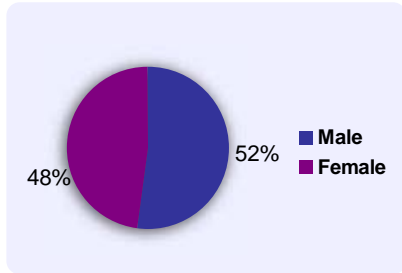
Fall '05 - Spring '06		
	Wave 1	Wave 2
INITIAL FAMILIARITY		
Extremely Familiar	14%	17%
Very Familiar	17%	14%
Moderately Familiar	13%	11%
Somewhat Familiar	20%	22%
Not at all Familiar	36%	37%
INCLUSION ON NEXT VEHICLE		
Extremely Likely	13%	12%
Very Likely	16%	13%
Likely	20%	23%
Somewhat Likely	31%	35%
Not at all Likely	20%	18%
VEHICLE DIFFERENTIATION		
Much More Likely	26%	27%
More Likely	24%	23%
Slightly More Likely	26%	26%
No More Likely	24%	24%
CONSIDERATION AT MARKET PRICE		
Extremely Likely	16%	17%
Very Likely	20%	15%
Likely	19%	18%
Somewhat Likely	25%	29%
Not at all Likely	20%	22%

Current Wave		Initial Familiarity	Inclusion On Next Vehicle	Vehicle Differentiation	Consideration At Market Price (\$100)
Vehicle Segment	Base	(Extremely/ Very Familiar)	(Extremely/ Very Likely)	(Much More/More Likely)	(Extremely/ Very Likely)
Compact Car	116	17%	13%	41%	21%
Mid-Size Car	144	27%	20%	49%	27%
Compact Pickup	108	18%	13%	45%	26%
Light/Heavy Duty Pickup	110	32%	17%	47%	29%
Entry SUV	147	27%	19%	49%	34%
Mid-Large SUV	123	33%	26%	55%	37%
Compact Van	123	19%	24%	55%	39%
Full-Size Car	78	21%	26%	35%	44%
Sports Car	95	48%	37%	41%	46%
Luxury Car	122	64%	57%	63%	38%
Luxury SUV	60	56%	57%	74%	63%
Total	1233	31%	25%	50%	32%

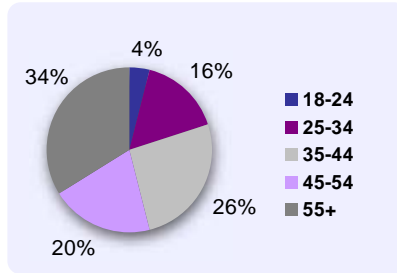


Demographics Among Considerers

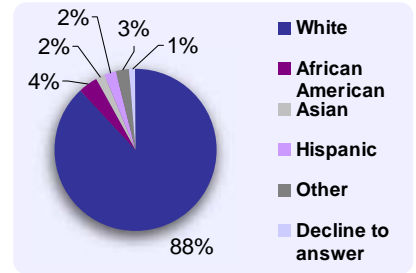
Gender



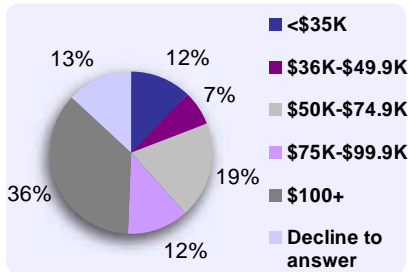
Age



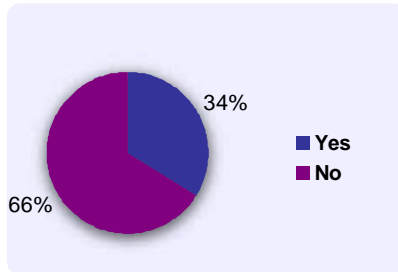
Ethnicity



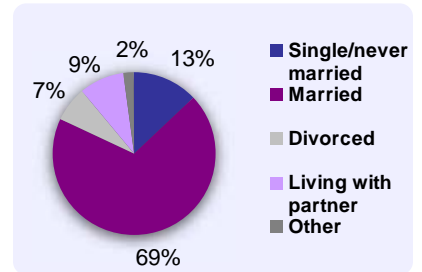
Income



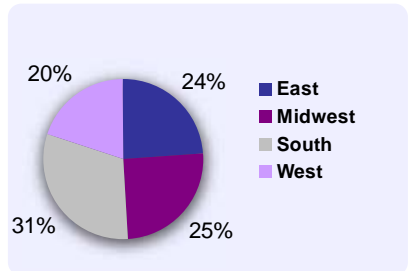
Children In Household



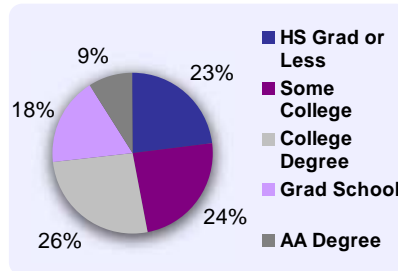
Marital Status



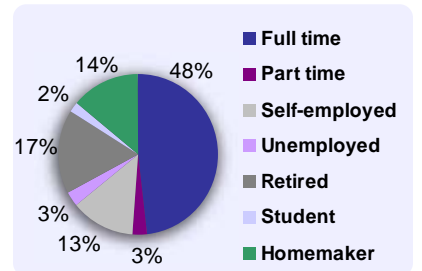
Region



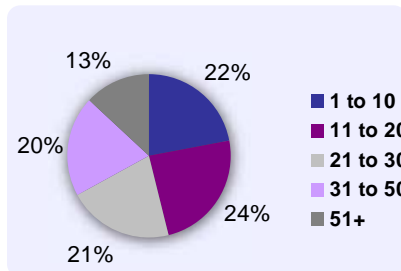
Education



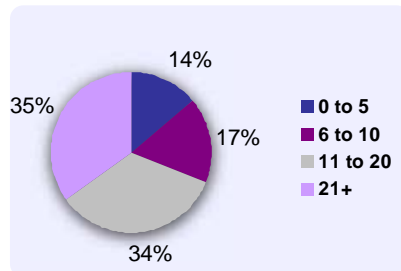
Employment Status



Daily Driving Distance

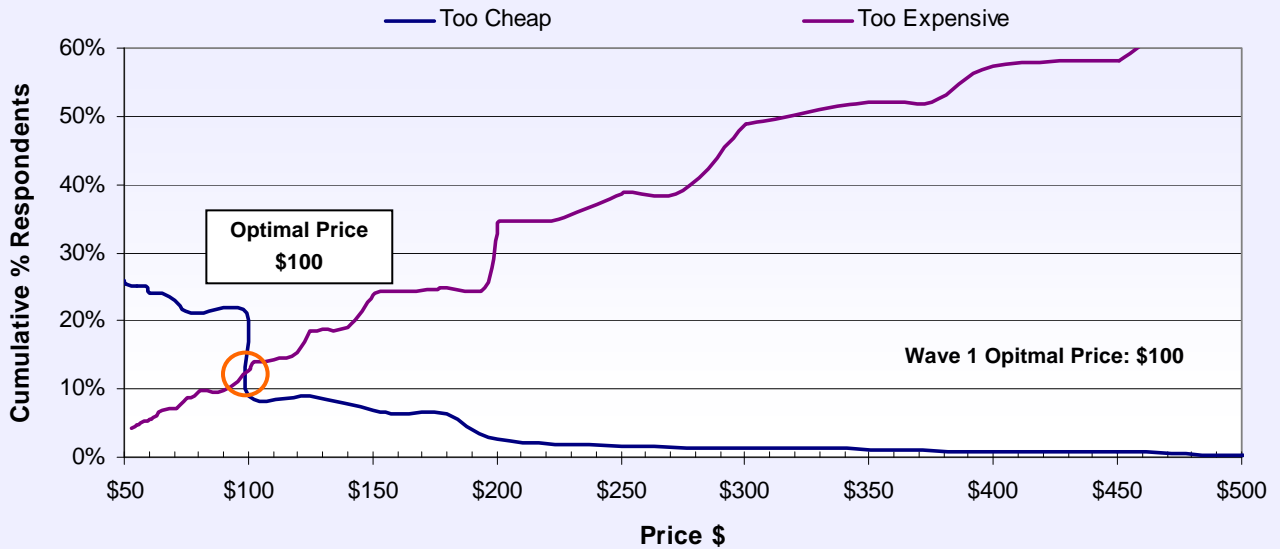


Internet Usage

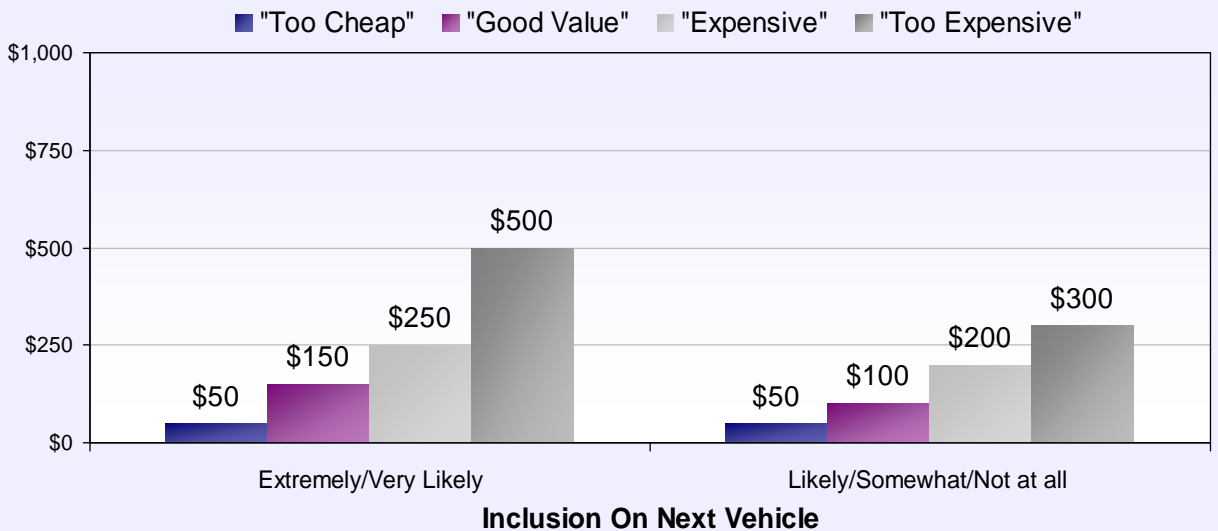




One Touch Up Power Windows (Including anti-trap feature)

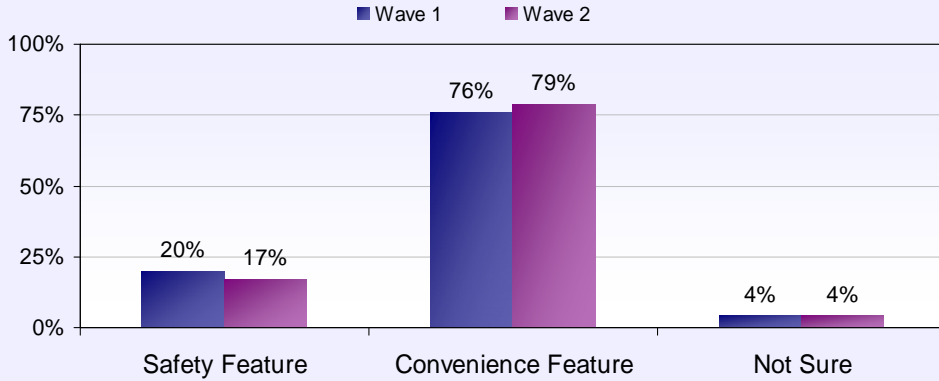


Technology Price Points (Medians)



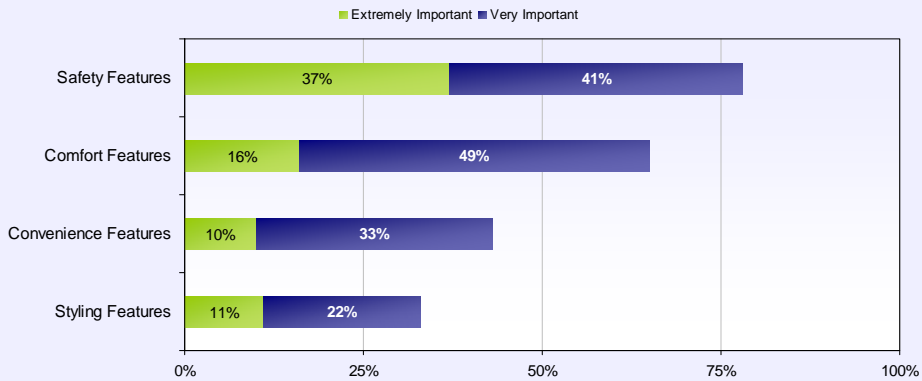


"Safety Feature" or "Convenience Feature"

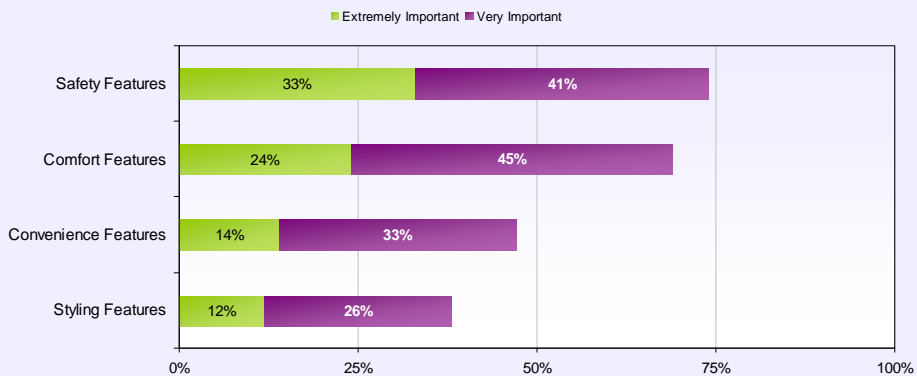


Importance of Vehicle Features (among those at least somewhat familiar)

Wave 1

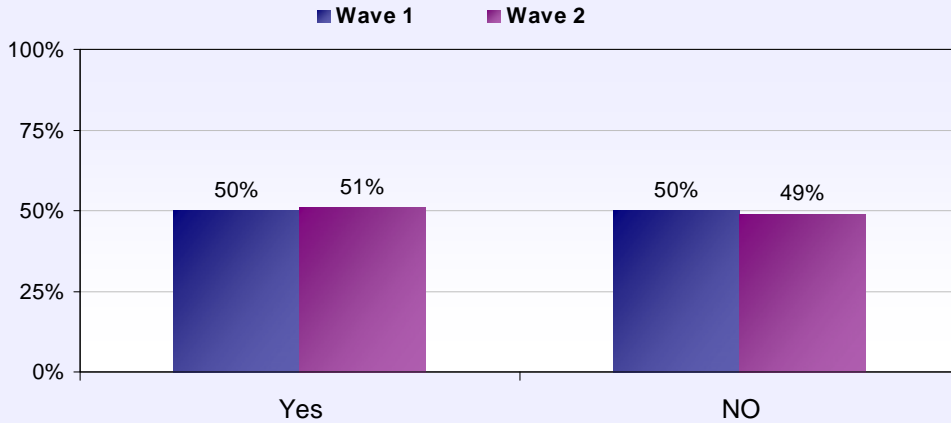


Wave 2





Awareness of Potential Dangers of Conventional Power Window Systems (among those at least somewhat familiar)



How Did You Become Familiar With One Touch Up Windows? (among those at least somewhat familiar)

