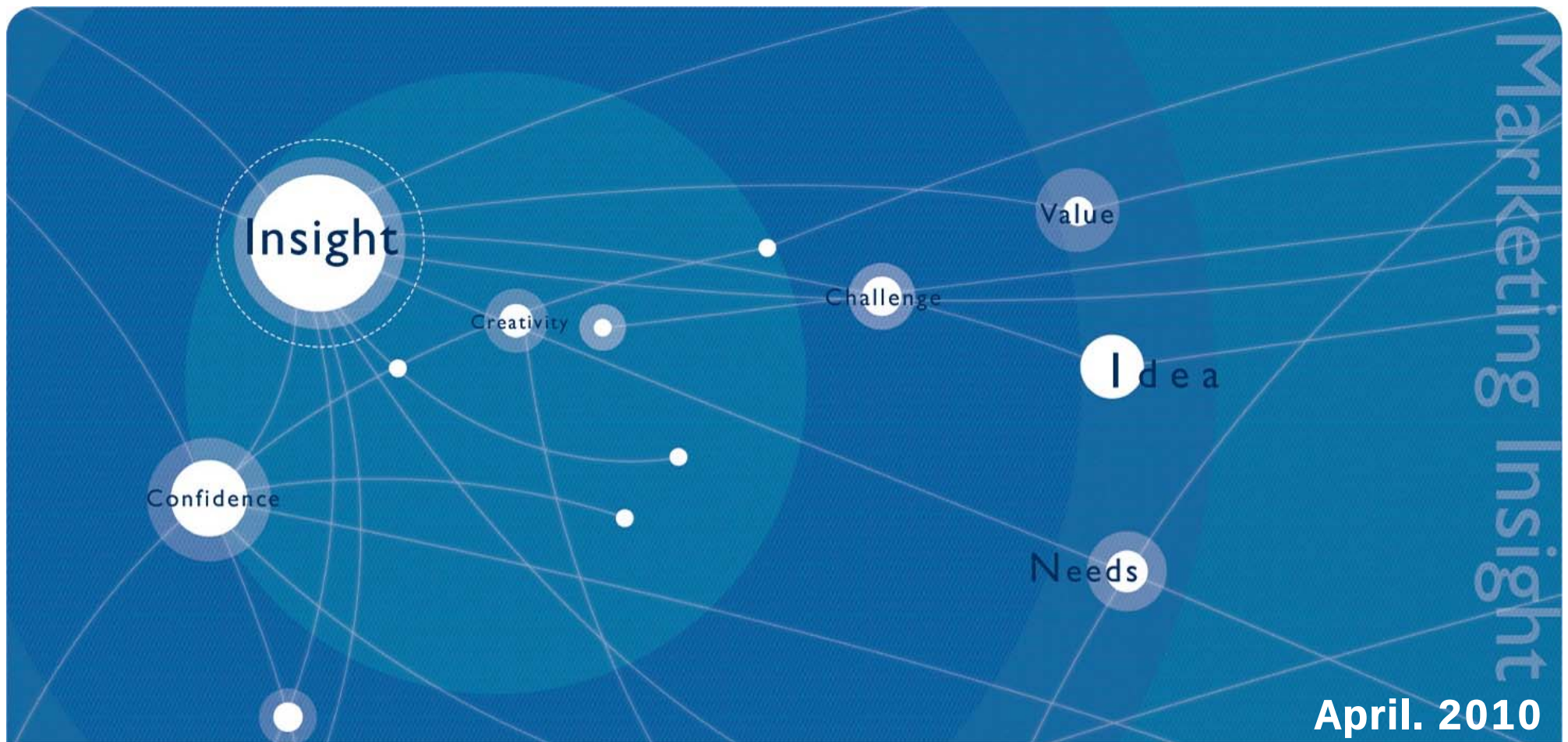




2009 Automotive Consumer Usage & Attitude

- 2009 Automotive Syndicated Study Result -

Marketing **Insight**

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2009 Automobile Consumer Behavior



Marketing Insight Inc. (www.mktinsight.co.kr, CEO: Kim, Jin-kook) is the only automotive marketing research firm in Korea which has conducted large scale syndicated automotive studies on 100,000 automobile consumers every July since 2001. We would like to share the result of the behavior and attitude of consumers who own vehicle or will purchase one within 2 years from the 9th study conducted on July 2009 as '2009 Automotive Consumer Usage & Attitude'. We anticipate this material to be utilized to understand the consumers who have currently purchased an automobile.

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< 2009 Automotive Syndicated Study Research(9th) Design >

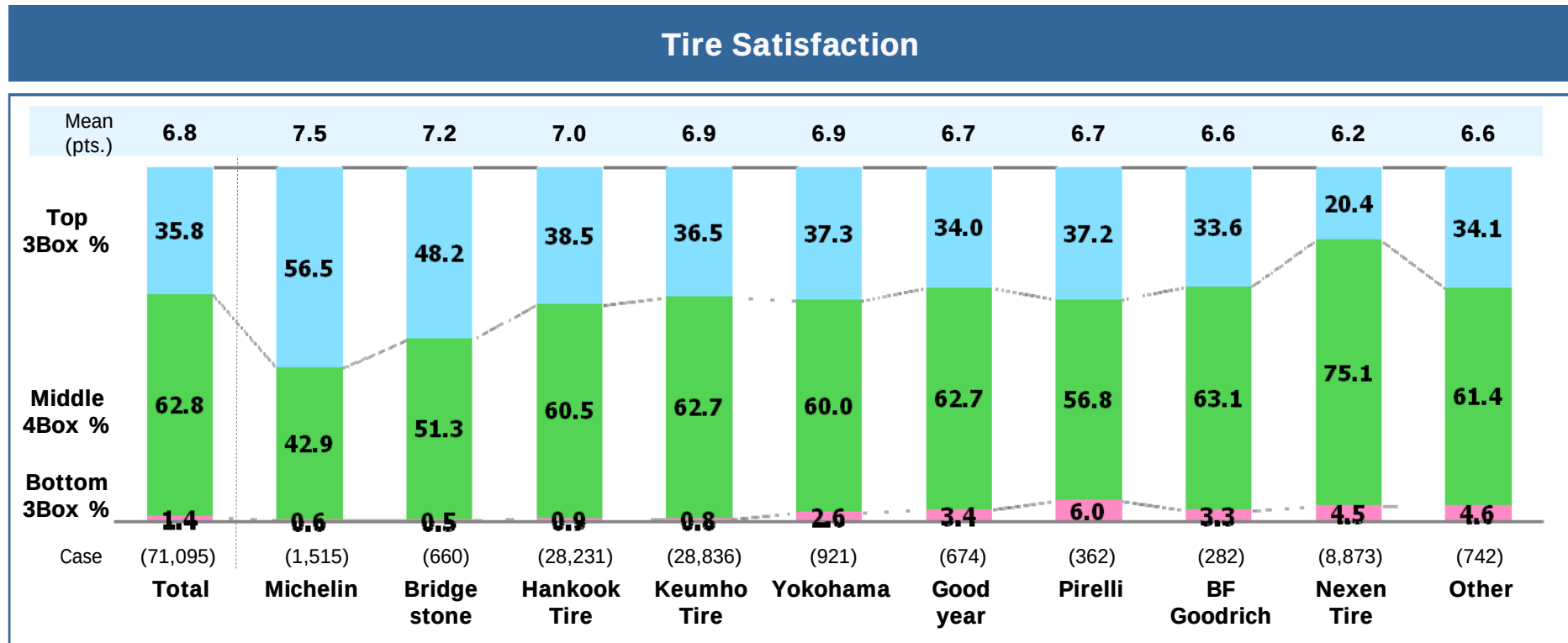
- Research method: E-mail survey
- Research target: Vehicle owners among driver's license holders, Vehicle purchase intenders by the first half of 2011
- Sample size: 91,129 persons
- Research period: July 2009

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1. Tire Satisfaction

- The satisfaction score on currently using tire came out to be 6.8 points (10 points scale).
- By manufacturer, Michelin scored the highest with 7.5 points, and as domestic makers Hankook Tire scored the highest (7.0 pts.), followed by Keumho Tire (6.9 pts.), and Nexen Tire (6.2 pts.).

(10 pts. scale, %)



* Survey target: automobile driver, 71,095 persons

Q) 1. With overall consideration, how do you evaluate the tire brand on 10 points scale?

1. Tire Satisfaction

- Among the items of Tire Satisfaction, 'Comfort ride'(26.4%) scored the highest, followed by 'No problem on tire'(25.7%), and 'Wear out and durability'(20.6%).
- The 1st in satisfaction, Michelin scored over 10%p higher than the industry average in 5 items including 'Comfort ride' and 'Wear out and durability'.

(%, Multiple answer)

Tire Satisfaction Item											
	Total	Keumho	Nexen	Hankook	BF Goodrich	Bridge stone	Goodyear	Michelin	Pirelli	Yokohama	Other
Comfort ride	26.4	26.5	16.4	27.9	23.7	31.4	30.1	44.4 ↑	31.5	37.6 ↑	27.7
No problem on tire	25.7	25.4	24.0	27.4	15.9	23.3	23.0	21.6	17.9	19.6	22.1
Wear out & durability	20.6	19.8	13.2	22.1	31.4 ↑	25.5	28.9	37.2 ↑	25.5	24.7	26.2
Tire noise on driving	13.6	12.9	9.0	14.3	16.8	18.5	18.1	25.6 ↑	16.2	25.3 ↑	16.2
No pulling	9.9	9.5	7.2	10.0	12.8	13.9	14.3	17.0	17.8	15.3	17.5
Friction force on wet road	9.7	9.2	7.1	9.8	13.9	16.4	15.8	20.1 ↑	17.2	14.2	12.8
Friction force on emergency condition	7.5	6.5	4.4	7.5	9.2	22.3 ↑	13.1	21.8 ↑	21.2 ↑	16.1	16.4
Fuel efficiency level	6.2	5.9	4.7	6.5	5.7	6.7	6.2	9.1	8.1	9.7	10.3
Friction force on snow	6.2	6.0	4.0	6.4	12.8	9.1	9.4	10.9	9.4	8.0	8.0
Tire design	5.8	5.4	4.7	5.6	10.5	10.7	11.0	9.6	10.2	11.7	10.8
Friction force on speedy acceleration	4.4	4.2	3.3	4.1	6.5	12.0	7.7	8.8	9.6	7.9	7.8
Don't know / None	35.6	36.2	46.8	34.1	27.1	19.7	26.7	14.4	23.5	21.9	28.3
(Case)	(71,095)	(28,836)	(8,873)	(28,231)	(282)	(660)	(674)	(1,515)	(362)	(921)	(742)

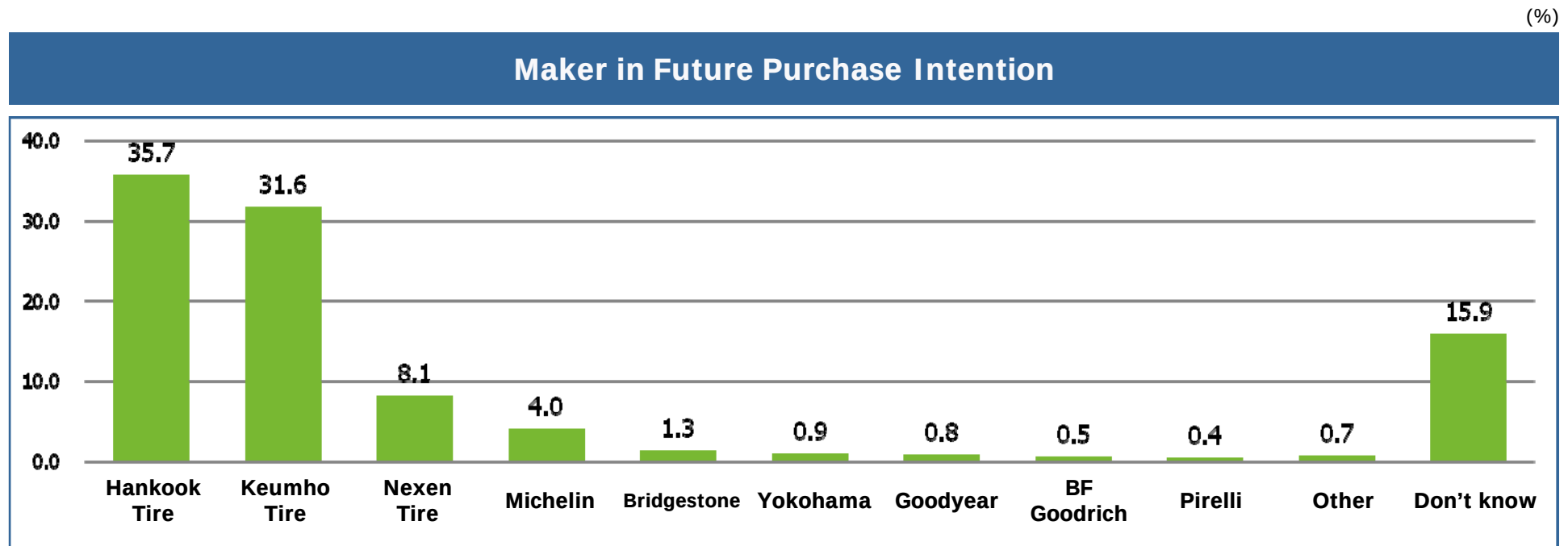
* Survey target: automobile driver, 71,095 persons

↑ :Over 10%p higher than Industry average

Q) 2. Please check mark all the satisfied items of the tire currently equipped on. [Multiple answer]

2. Future Purchase Plan

- Purchase intention in the future had Hankook tire the highest(35.7%), followed by Keumho tire(31.6%) and Nexen tire(8.1%).
- Among the imported brands, Michelin was the highest at 4.0%.

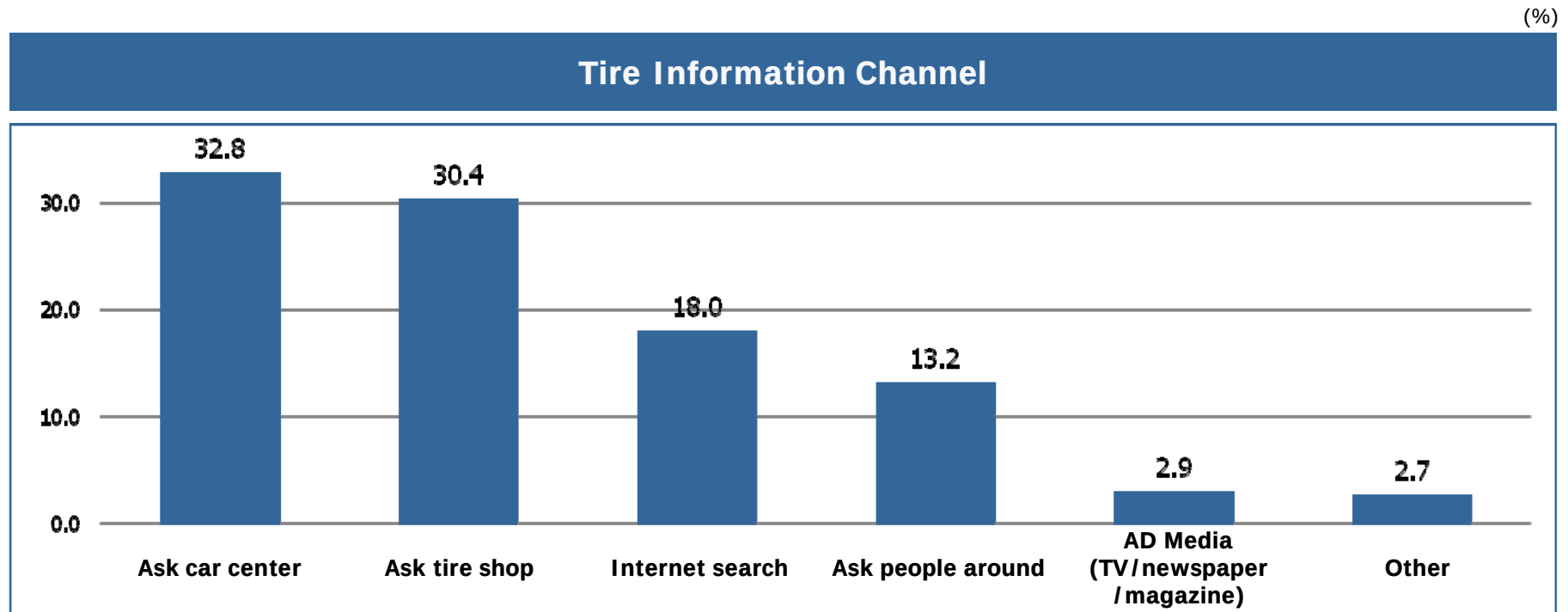


* Survey target: automobile driver, 71,095 persons

Q) 3. When you replace the tire in the future, which brand you would like to purchase?

3. Information Channel for Tire

- The method to acquire tire information had 'Ask car center'(32.8%) as the highest, followed by 'Ask tire shop'(30.4%), and 'Internet search'(18.0%).
- On the contrary, advertising media such as 'TV/Newspaper/Magazine'(2.9%) provided low percentage of acquiring information.



* Survey target: automobile driver, 71,095 persons

Q) 4. From which channel do you mainly acquire information on tire before purchasing them?