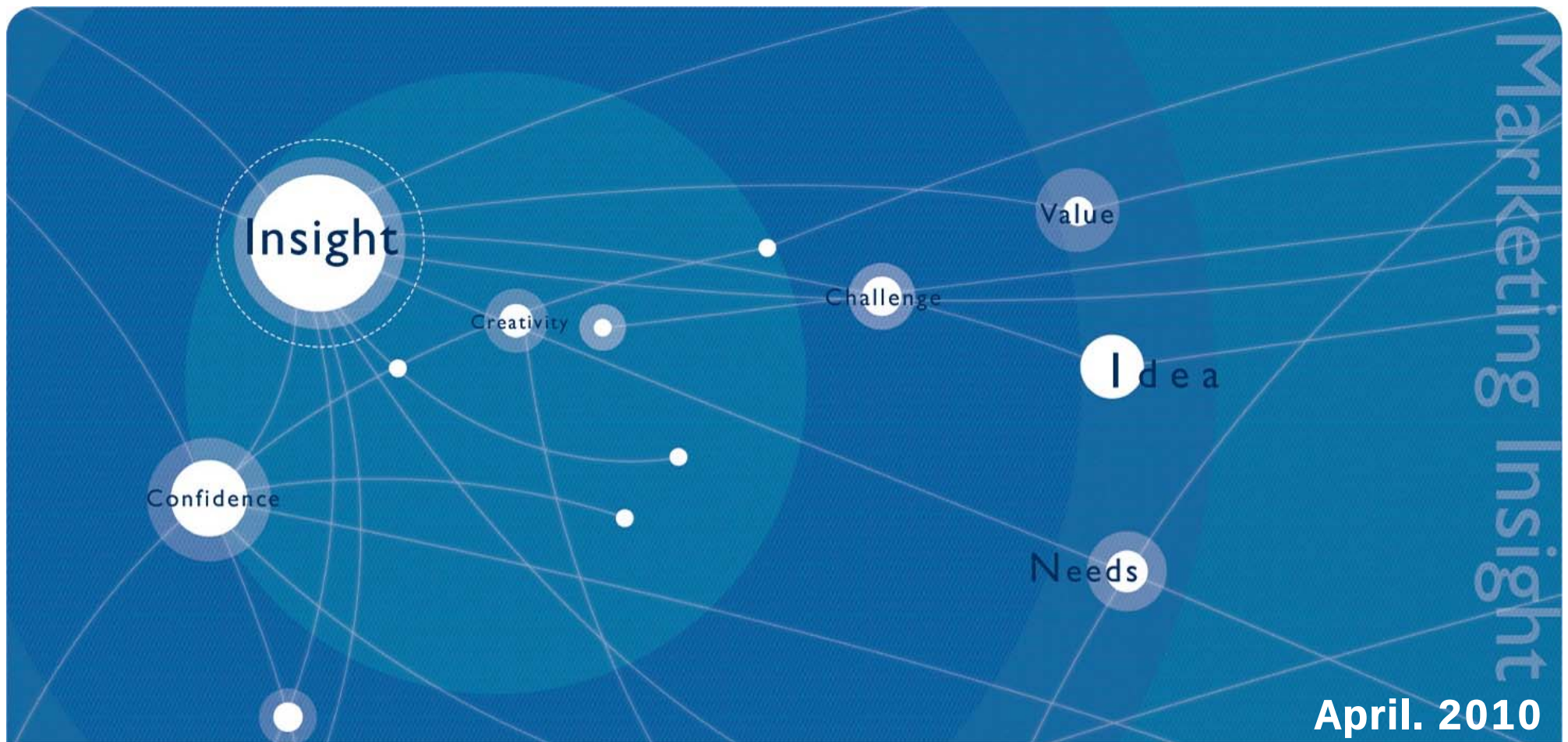




2009 Automotive Consumer Usage & Attitude

- 2009 Automotive Syndicated Study Result -

Marketing **Insight**

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서울시 강남구 논현동 216-3 히아빌딩 4층

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.

Table of Content

1. Subscription Behavior of Automobile Insurance	05 April
2. Purchase Behavior of Used Cars	08 April
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6. Direction Guide Service Usage Behavior	22 April
7. Purchase Plan for Low Pollution Vehicle	26 April

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

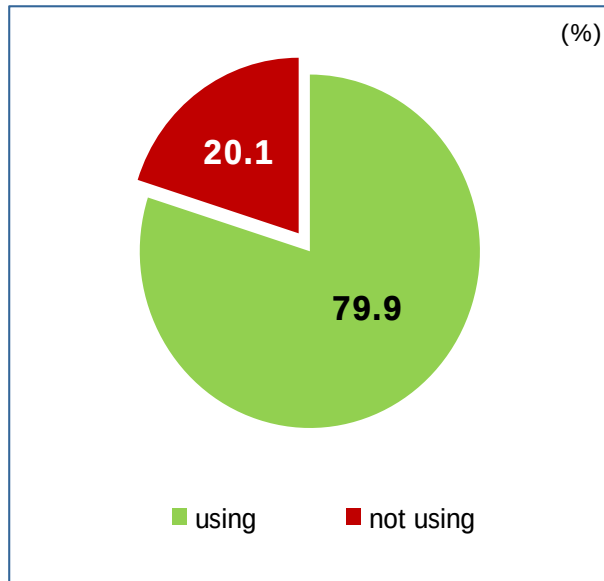
- Research method: E-mail survey
- Research target: Vehicle owners among driver's license holders, Vehicle purchase intenders by the first half of 2011
- Sample size: 91,129 persons
- Research period: July 2009

[Inquiry] Lee, Kun-Hyo, Managing Director
Tel: 02-6004-7622, E-mail: leekh@mktinsight.co.kr

1. Navigation Use Behavior

- 79.9% of vehicle drivers use navigation devices.
- For mount type, 'fixed/external type' took 62.7%, and 37.3% for 'embedded/internal type'.
- For mount time, 'attached by maker at vehicle delivery' took the highest at 50.1%, followed by 'separately installed at a car center or tuning shop' (30.6%), and 'sales person installed it separately during delivery process' (19.3%).

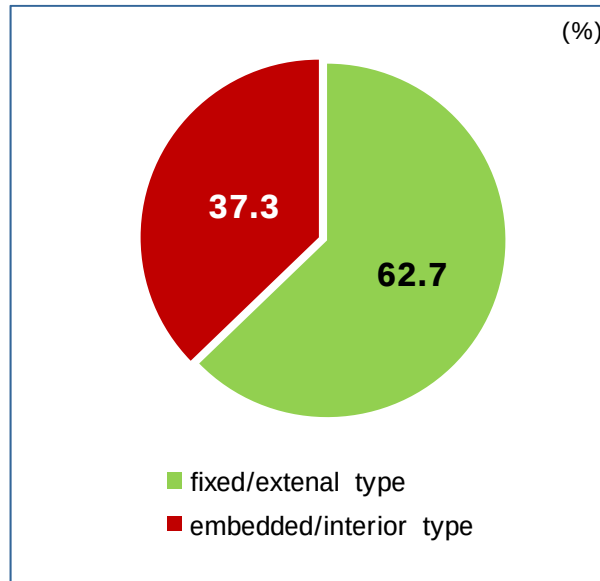
Navigation Use



* Survey Target: Vehicle drivers, 6,790 persons

Q) 1. Is your mainly driven car equipped with a navigation and being used?

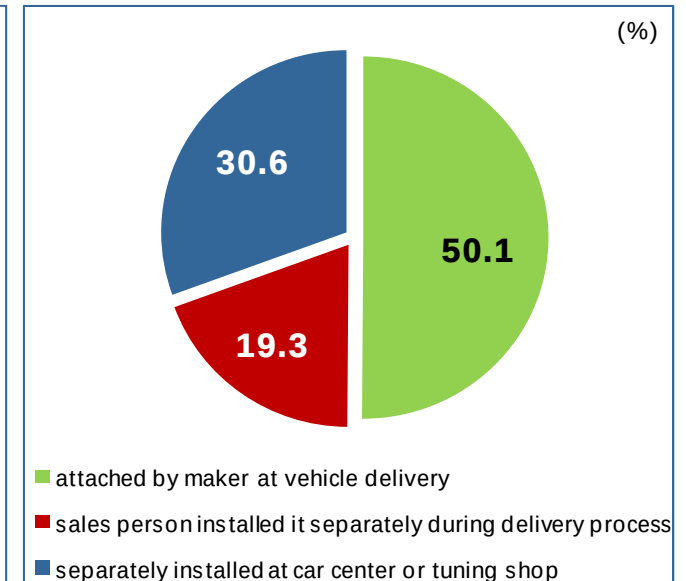
Navigation Mount Type



* Survey Target: Navigation users, 5,427 persons

Q) 2. In which way the currently using navigation was installed?

Navigation Mount Time



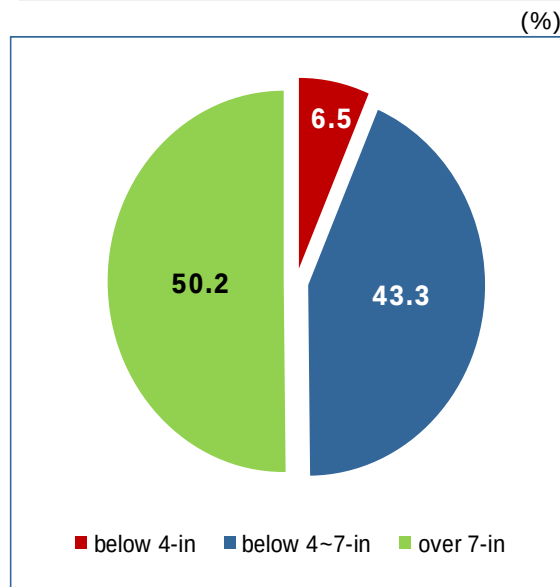
* Survey Target: Embedded/internal type navigation users, 2,022 persons

Q) 3. Through which method the navigation device installed?

1. Navigation Use Behavior

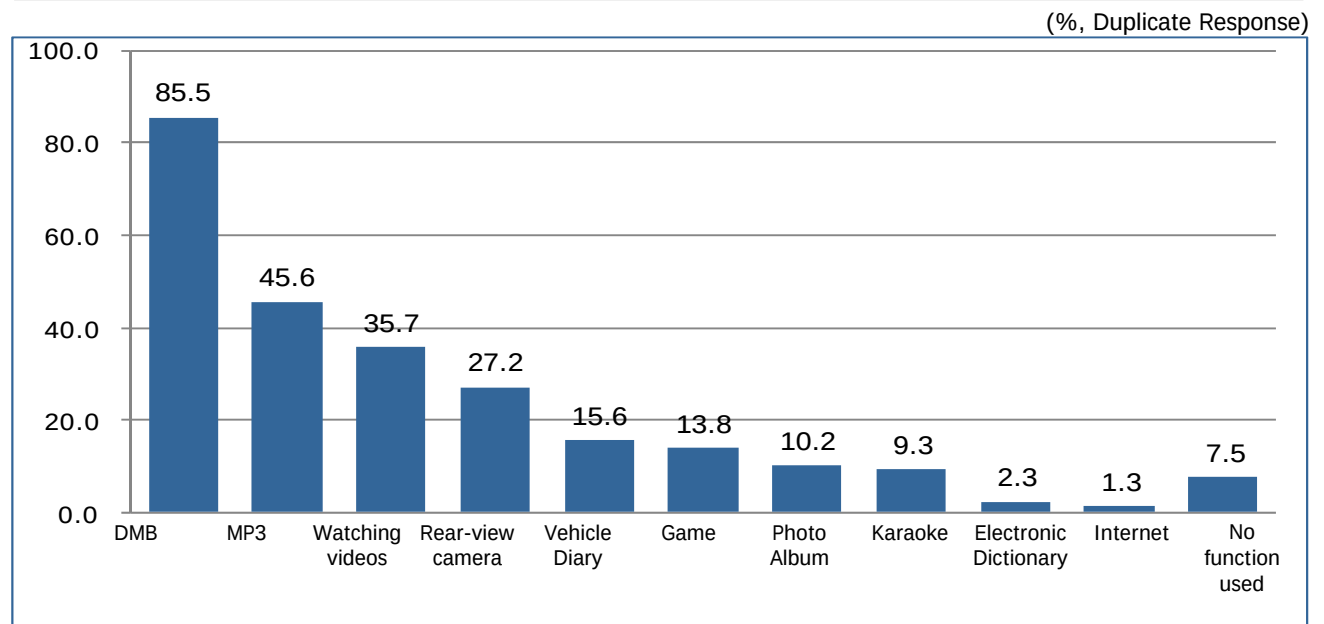
- Among the used navigations, 'over 7-in' LCD had the highest portion with 50.2%, followed by 'below 4~7-in' (43.3%), and 'below 4-in' (6.5%).
- For function use experience, 'DMB' was the highest at 85.5%, followed by 'MP3'(45.6%), 'watching videos'(35.7%), and 'rear-view camera'(27.2%).

Navigation Screen Size



* Survey Target: Navigation user, 5,427 persons

Navigation Function Use Experience



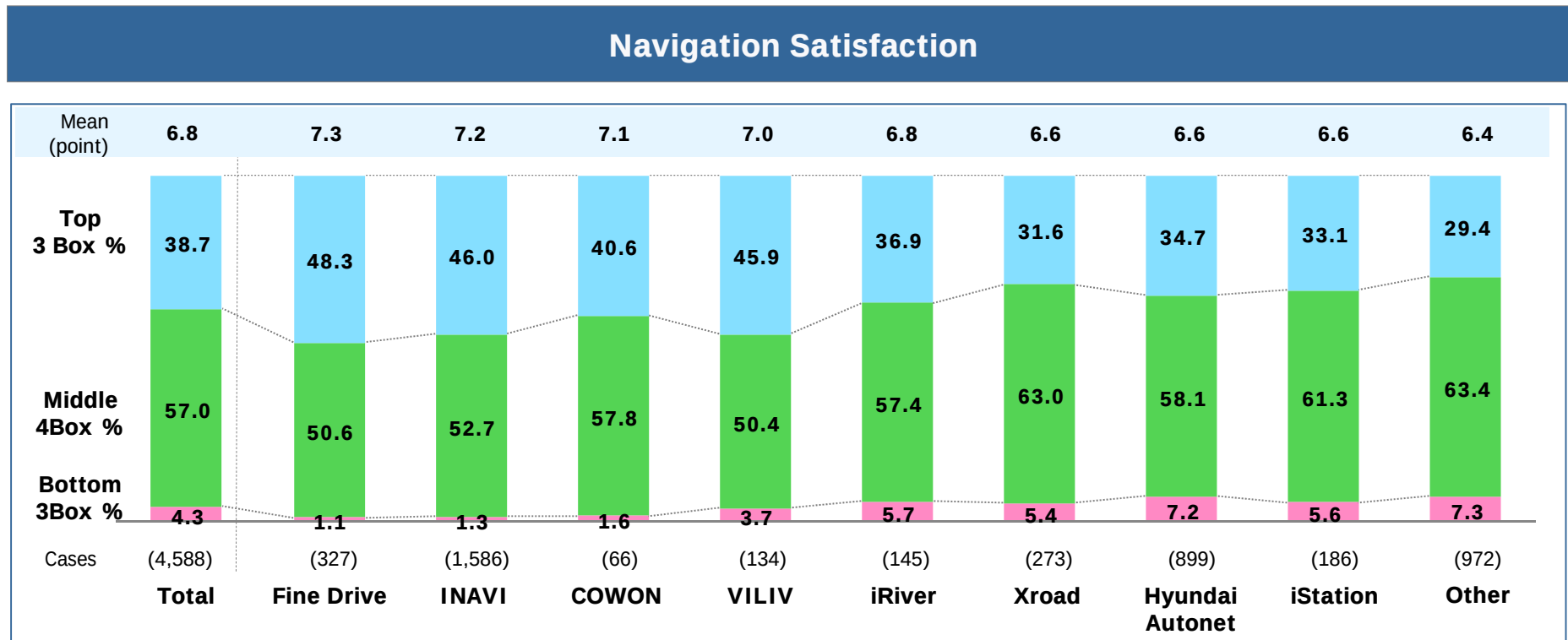
Q) 4. How many inches is your currently using navigation screen?

Q) 5. What are the functions you experienced to use with the currently using navigation? [Multiple answer]

2. Navigation Satisfaction

- The navigation satisfaction on average was 6.8 points on 10 point scale.
- By company, 'Fine Drive' was the highest with 7.3 points followed by 'INAVI'(7.2 points), 'COWON'(7.1 points), and 'VILIV'(7.0 points)

(10 point scale, %)



* Survey Target: Vehicle driver, 4,588 persons

Q) 6. When considering all of the performance, quality, and updating of currently using Navigation on a 10 point scale, how would you grade it?

3. Problems Experienced While Using Navigation

- Navigation users experienced 'initial reception problem' (37.1%) the most, followed by 'power & boot problem' (24.8%), and 'update problem' (20.8).
- 43.2% of 'Fine Drive', the 1st in satisfaction, users responded with 'no problem experienced' and it also had the lowest experience rate in 'initial reception problem'.

(%, Multiple answer)

Problems Experienced While Using Navigation by Company										
	Total	Fine Drive	INAVI	COWON	VILIV	iRiver	Xroad	Hyundai Autonet	iStation	Other
Initial reception problem	37.1	22.9 ↓	33.9	37.1	30.9	51.6 ↑	58.4 ↑	33.2	47.8 ↑	41.5
Power & boot problem	24.8	25.9	23.4	27.1	26.6	20.0	33.7	19.1	37.4 ↑	27.3
Update problem	20.8	19.9	19.2	21.5	14.7	13.3	22.5	23.3	22.9	22.3
Road assistance setup problem	17.1	13.5	16.6	10.8	16.0	20.3	22.1	16.4	19.4	18.3
Road assistance progress function problem	16.1	13.9	17.8	15.8	10.0	20.9	19.0	12.8	21.3	15.5
Additional function problem	14.5	11.3	13.8	11.6	24.4	14.9	15.5	12.3	19.0	16.6
Screen/picture problem	9.4	5.1	9.1	4.6	8.2	7.9	7.5	9.6	14.9	11.3
Other defects/quality problem	7.7	7.0	7.1	7.2	7.5	5.9	8.3	7.3	9.8	9.0
Outer case problem	6.2	2.3	6.7	2.8	9.0	4.6	7.9	4.7	10.1	6.8
No problem experienced	37.8	43.2	42.7	37.1	42.8	33.4	22.5 ↓	40.4	26.8 ↓	32.2
(Cases)	(4,588)	(327)	(1,586)	(66)	(134)	(145)	(273)	(899)	(186)	(972)

* Survey Target: Vehicle drivers, 4,588 persons

↑ More than 10%p higher than the average of total

↓ More than 10%p lower than the average of total

Q) 7. Which problem did you experience from the following while using navigation? [Multiple answer]