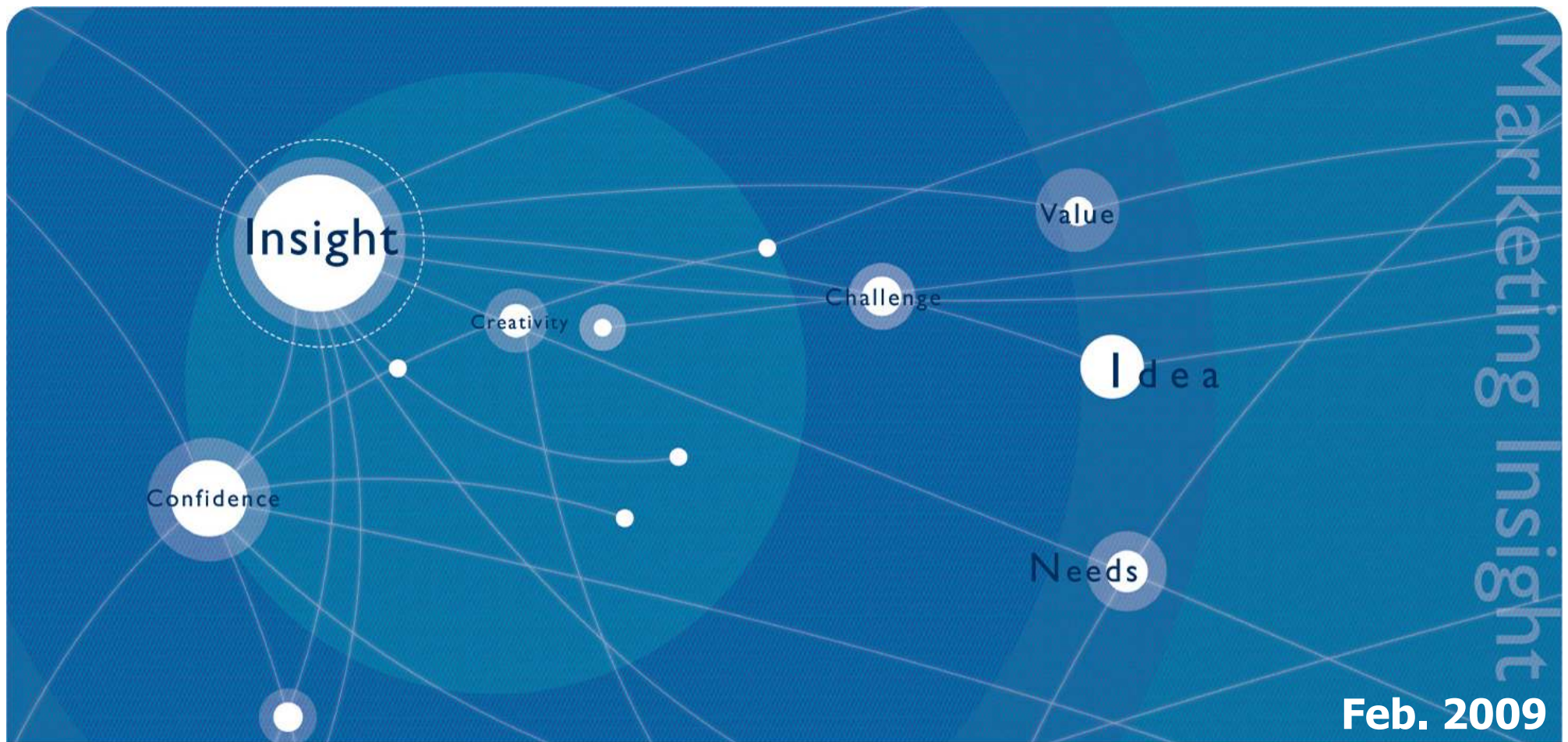




2008 Automotive Consumer Usage & Attitude

- 2008 Syndicated Automotive Study Result -

Marketing **Insight**

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2008 Automotive Consumer U & A



Marketing Insight Inc. (www.mktinsight.co.kr, CEO: Kim, Jin-kook) is an automotive marketing research company that has been conducting large scale syndicated automotive studies on around 100,000 consumers every July (accumulated number of respondents: 950,000).

'2008 Automotive Consumer Usage & Attitude' is the result of a large-scale syndicated survey in the field of automobiles with new car buyers within past one year (July 2007 - June 2008). It should be a meaningful source to review and predict the consumer trend over the last five years (2004 - '08).

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< 2008 Automotive Syndicated Study Research Design >

- Research method: E-mail survey
- Research target: Vehicle owners among driving license holders, intenders planning to purchase a vehicle by first half of 2010
- Sample size: 95,472 persons
- Research period: July 2008

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13. Navigation Usage

- 72.5% of the car drivers use navigation and, 72.1% of the navigation users have 'mounted/external navigation'.
- About half of 'built-in/internal navigations' are OE (Original Equipped). OE only accounts for 12.7% of total navigation.
- 90% of the navigation users use a 4-inch screen. '7 inches or more' is 48.1% and '4-6 inches' is 44.0%.
- The most used function of navigation is 'DMB (TV/Radio)'.

Usage and model of navigation	Time of equipped navigation	Size of navigation display	Usage of experience navigation functions																																																				
Q) 1. Do you have a navigation in your car? It means a separate terminal such as a mounted or built-in navigation, not a cellular phone. <table><tr><td></td><td>(%)</td></tr><tr><td>▪ Yes, I have.</td><td>72.5</td></tr><tr><td>▪ No, I don't.</td><td>27.5</td></tr></table> * The car drivers, 9,180 persons Q) 2. What kind of method is your navigation equipped? <table><tr><td></td><td>(%)</td></tr><tr><td>▪ Mounted/external navigation</td><td>72.1</td></tr><tr><td>▪ Built-in/internal navigation</td><td>27.9</td></tr></table> * The car drivers who use a navigation, 6,651 persons		(%)	▪ Yes, I have.	72.5	▪ No, I don't.	27.5		(%)	▪ Mounted/external navigation	72.1	▪ Built-in/internal navigation	27.9	Q) 3. When did you have the built-in/internal navigation fitted? <table><tr><td></td><td>(%)</td></tr><tr><td>▪ The navigation was fitted by maker at delivery.</td><td>45.5</td></tr><tr><td>▪ I had it fitted at the car center, the tuning shop, etc.</td><td>30.5</td></tr><tr><td>▪ Salesperson offered it to be fitted at delivery.</td><td>24.0</td></tr></table> * The car drivers who use a built-in/internal navigation, 1,859 persons		(%)	▪ The navigation was fitted by maker at delivery.	45.5	▪ I had it fitted at the car center, the tuning shop, etc.	30.5	▪ Salesperson offered it to be fitted at delivery.	24.0	Q) 4. How big is the display screen of your navigation? <table><tr><td></td><td>(%)</td></tr><tr><td>▪ 7 inches or more</td><td>48.1</td></tr><tr><td>▪ 4-6 inches</td><td>44.0</td></tr><tr><td>▪ Less than 4 inches</td><td>7.9</td></tr></table> * The car drivers who use a navigation, 6,651 persons		(%)	▪ 7 inches or more	48.1	▪ 4-6 inches	44.0	▪ Less than 4 inches	7.9	Q) 5. What functions have you used on your navigation? Please check all that apply. [Multiple responses] <table><tr><td></td><td>(%)</td></tr><tr><td>▪ DMB (TV/Radio)</td><td>82.8</td></tr><tr><td>▪ MP3</td><td>44.5</td></tr><tr><td>▪ Video</td><td>37.3</td></tr><tr><td>▪ A rear-view camera</td><td>19.3</td></tr><tr><td>▪ Game</td><td>18.5</td></tr><tr><td>▪ Auto history report</td><td>16.7</td></tr><tr><td>▪ Photo album</td><td>12.2</td></tr><tr><td>▪ Karaoke</td><td>10.5</td></tr><tr><td>▪ None of experiences</td><td>8.5</td></tr><tr><td>▪ Electronic dictionary</td><td>4.0</td></tr><tr><td>▪ Internet</td><td>2.1</td></tr></table> * The car drivers who use a navigation, 6,651 persons		(%)	▪ DMB (TV/Radio)	82.8	▪ MP3	44.5	▪ Video	37.3	▪ A rear-view camera	19.3	▪ Game	18.5	▪ Auto history report	16.7	▪ Photo album	12.2	▪ Karaoke	10.5	▪ None of experiences	8.5	▪ Electronic dictionary	4.0	▪ Internet	2.1
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