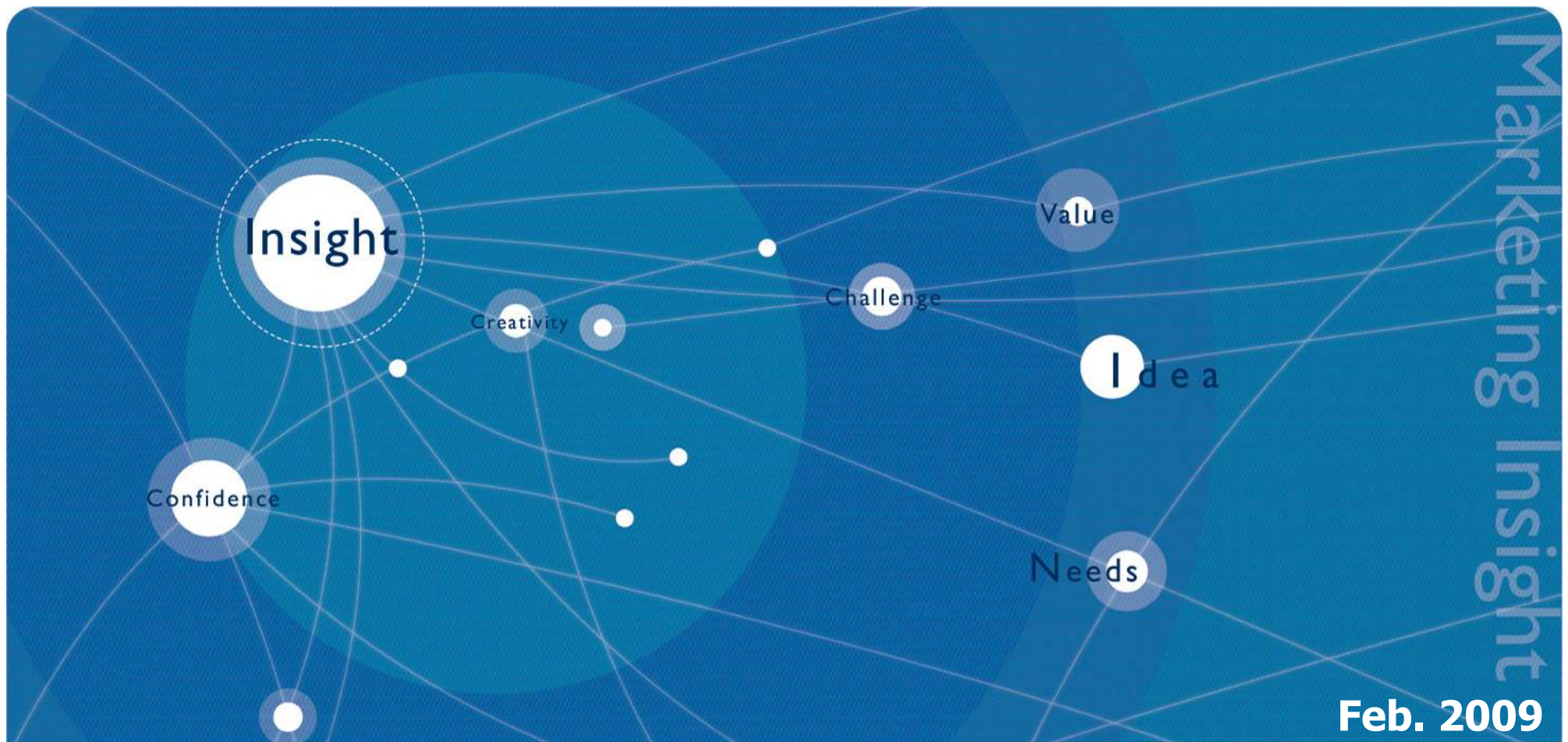




# 2008 Automotive Consumer Usage & Attitude

- 2008 Syndicated Automotive Study Result -

# 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) and purchase intenders within next two years. 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

[Inquiry] Lee, Gyeong-seok, deputy general manager  
Tel: 02-6004-7612, E-mail: [leeks@mktinsight.co.kr](mailto:leeks@mktinsight.co.kr)

## 10. Purchased vs. Preferred Vehicles [New car buyers within past one year vs. Purchase intenders within next two years]

- More than half of new car buyers and intenders purchased/preferred 'Sedan'.
- More than half of new car buyers and intenders purchased/preferred a 'Gasoline' car. Preference for Hybrid was increasing.
- More than half of new car buyers and intenders purchased/preferred engine displacement of '2000-2500cc'.
- Preference for a large engine displacement was observed.

| Vehicle type                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | Fuel type                                                                    | Displacement                                                                           |                      |         |      |      |                     |      |      |             |      |        |               |     |     |         |     |     |         |     |     |         |     |     |  |   |  |                                                                                                                                                                                                                                                                                                                                                             |  |                |                    |            |      |        |          |      |        |       |      |      |          |     |       |  |   |  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |  |                |                    |         |     |     |               |     |     |               |      |        |               |      |      |               |      |     |                    |     |        |  |   |  |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------|----------------------------------------------------------------------------------------|----------------------|---------|------|------|---------------------|------|------|-------------|------|--------|---------------|-----|-----|---------|-----|-----|---------|-----|-----|---------|-----|-----|--|---|--|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|----------------|--------------------|------------|------|--------|----------|------|--------|-------|------|------|----------|-----|-------|--|---|--|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|----------------|--------------------|---------|-----|-----|---------------|-----|-----|---------------|------|--------|---------------|------|------|---------------|------|-----|--------------------|-----|--------|--|---|--|
| Q) 1. What is the body type of the vehicle you purchased/intend to purchase?                                                                                                                                                                                                                                                                                                                                                                                                                                                           | Q) 2. What is the fuel type of the vehicle you purchased/intend to purchase? | Q) 3. What is the engine displacement of the vehicle you purchased/intend to purchase? |                      |         |      |      |                     |      |      |             |      |        |               |     |     |         |     |     |         |     |     |         |     |     |  |   |  |                                                                                                                                                                                                                                                                                                                                                             |  |                |                    |            |      |        |          |      |        |       |      |      |          |     |       |  |   |  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |  |                |                    |         |     |     |               |     |     |               |      |        |               |      |      |               |      |     |                    |     |        |  |   |  |
| <table> <tr> <th></th><th>New car buyers*</th><th>Purchase intenders**</th></tr> <tr> <td>▪ Sedan</td><td>58.0</td><td>57.6</td></tr> <tr> <td>▪ RV (SUV/Mini-van)</td><td>24.1</td><td>25.5</td></tr> <tr> <td>▪ Hatchback</td><td>16.7</td><td>12.5 ▼</td></tr> <tr> <td>▪ Convertible</td><td>0.3</td><td>1.5</td></tr> <tr> <td>▪ Wagon</td><td>0.2</td><td>1.3</td></tr> <tr> <td>▪ Coupe</td><td>0.5</td><td>0.8</td></tr> <tr> <td>▪ Other</td><td>0.2</td><td>0.7</td></tr> <tr> <td></td><td colspan="2">%</td></tr> </table> |                                                                              | New car buyers*                                                                        | Purchase intenders** | ▪ Sedan | 58.0 | 57.6 | ▪ RV (SUV/Mini-van) | 24.1 | 25.5 | ▪ Hatchback | 16.7 | 12.5 ▼ | ▪ Convertible | 0.3 | 1.5 | ▪ Wagon | 0.2 | 1.3 | ▪ Coupe | 0.5 | 0.8 | ▪ Other | 0.2 | 0.7 |  | % |  | <table> <tr> <th></th><th>New car buyers</th><th>Purchase intenders</th></tr> <tr> <td>▪ Gasoline</td><td>64.9</td><td>59.1 ▼</td></tr> <tr> <td>▪ Diesel</td><td>21.4</td><td>15.2 ▼</td></tr> <tr> <td>▪ LPG</td><td>13.6</td><td>17.0</td></tr> <tr> <td>▪ Hybrid</td><td>0.0</td><td>8.7 ▲</td></tr> <tr> <td></td><td colspan="2">%</td></tr> </table> |  | New car buyers | Purchase intenders | ▪ Gasoline | 64.9 | 59.1 ▼ | ▪ Diesel | 21.4 | 15.2 ▼ | ▪ LPG | 13.6 | 17.0 | ▪ Hybrid | 0.0 | 8.7 ▲ |  | % |  | <table> <tr> <th></th><th>New car buyers</th><th>Purchase intenders</th></tr> <tr> <td>▪ 800cc</td><td>5.1</td><td>0.7</td></tr> <tr> <td>▪ 1000-1500cc</td><td>9.8</td><td>8.6</td></tr> <tr> <td>▪ 1600-1900cc</td><td>18.5</td><td>10.4 ▼</td></tr> <tr> <td>▪ 2000-2500cc</td><td>49.2</td><td>49.5</td></tr> <tr> <td>▪ 2600-2900cc</td><td>10.0</td><td>8.8</td></tr> <tr> <td>▪ More than 3000cc</td><td>7.3</td><td>22.1 ▲</td></tr> <tr> <td></td><td colspan="2">%</td></tr> </table> |  | New car buyers | Purchase intenders | ▪ 800cc | 5.1 | 0.7 | ▪ 1000-1500cc | 9.8 | 8.6 | ▪ 1600-1900cc | 18.5 | 10.4 ▼ | ▪ 2000-2500cc | 49.2 | 49.5 | ▪ 2600-2900cc | 10.0 | 8.8 | ▪ More than 3000cc | 7.3 | 22.1 ▲ |  | % |  |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | New car buyers*                                                              | Purchase intenders**                                                                   |                      |         |      |      |                     |      |      |             |      |        |               |     |     |         |     |     |         |     |     |         |     |     |  |   |  |                                                                                                                                                                                                                                                                                                                                                             |  |                |                    |            |      |        |          |      |        |       |      |      |          |     |       |  |   |  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |  |                |                    |         |     |     |               |     |     |               |      |        |               |      |      |               |      |     |                    |     |        |  |   |  |
| ▪ Sedan                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | 58.0                                                                         | 57.6                                                                                   |                      |         |      |      |                     |      |      |             |      |        |               |     |     |         |     |     |         |     |     |         |     |     |  |   |  |                                                                                                                                                                                                                                                                                                                                                             |  |                |                    |            |      |        |          |      |        |       |      |      |          |     |       |  |   |  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |  |                |                    |         |     |     |               |     |     |               |      |        |               |      |      |               |      |     |                    |     |        |  |   |  |
| ▪ RV (SUV/Mini-van)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | 24.1                                                                         | 25.5                                                                                   |                      |         |      |      |                     |      |      |             |      |        |               |     |     |         |     |     |         |     |     |         |     |     |  |   |  |                                                                                                                                                                                                                                                                                                                                                             |  |                |                    |            |      |        |          |      |        |       |      |      |          |     |       |  |   |  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |  |                |                    |         |     |     |               |     |     |               |      |        |               |      |      |               |      |     |                    |     |        |  |   |  |
| ▪ Hatchback                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | 16.7                                                                         | 12.5 ▼                                                                                 |                      |         |      |      |                     |      |      |             |      |        |               |     |     |         |     |     |         |     |     |         |     |     |  |   |  |                                                                                                                                                                                                                                                                                                                                                             |  |                |                    |            |      |        |          |      |        |       |      |      |          |     |       |  |   |  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |  |                |                    |         |     |     |               |     |     |               |      |        |               |      |      |               |      |     |                    |     |        |  |   |  |
| ▪ Convertible                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | 0.3                                                                          | 1.5                                                                                    |                      |         |      |      |                     |      |      |             |      |        |               |     |     |         |     |     |         |     |     |         |     |     |  |   |  |                                                                                                                                                                                                                                                                                                                                                             |  |                |                    |            |      |        |          |      |        |       |      |      |          |     |       |  |   |  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |  |                |                    |         |     |     |               |     |     |               |      |        |               |      |      |               |      |     |                    |     |        |  |   |  |
| ▪ Wagon                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | 0.2                                                                          | 1.3                                                                                    |                      |         |      |      |                     |      |      |             |      |        |               |     |     |         |     |     |         |     |     |         |     |     |  |   |  |                                                                                                                                                                                                                                                                                                                                                             |  |                |                    |            |      |        |          |      |        |       |      |      |          |     |       |  |   |  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |  |                |                    |         |     |     |               |     |     |               |      |        |               |      |      |               |      |     |                    |     |        |  |   |  |
| ▪ Coupe                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | 0.5                                                                          | 0.8                                                                                    |                      |         |      |      |                     |      |      |             |      |        |               |     |     |         |     |     |         |     |     |         |     |     |  |   |  |                                                                                                                                                                                                                                                                                                                                                             |  |                |                    |            |      |        |          |      |        |       |      |      |          |     |       |  |   |  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |  |                |                    |         |     |     |               |     |     |               |      |        |               |      |      |               |      |     |                    |     |        |  |   |  |
| ▪ Other                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | 0.2                                                                          | 0.7                                                                                    |                      |         |      |      |                     |      |      |             |      |        |               |     |     |         |     |     |         |     |     |         |     |     |  |   |  |                                                                                                                                                                                                                                                                                                                                                             |  |                |                    |            |      |        |          |      |        |       |      |      |          |     |       |  |   |  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |  |                |                    |         |     |     |               |     |     |               |      |        |               |      |      |               |      |     |                    |     |        |  |   |  |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | %                                                                            |                                                                                        |                      |         |      |      |                     |      |      |             |      |        |               |     |     |         |     |     |         |     |     |         |     |     |  |   |  |                                                                                                                                                                                                                                                                                                                                                             |  |                |                    |            |      |        |          |      |        |       |      |      |          |     |       |  |   |  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |  |                |                    |         |     |     |               |     |     |               |      |        |               |      |      |               |      |     |                    |     |        |  |   |  |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | New car buyers                                                               | Purchase intenders                                                                     |                      |         |      |      |                     |      |      |             |      |        |               |     |     |         |     |     |         |     |     |         |     |     |  |   |  |                                                                                                                                                                                                                                                                                                                                                             |  |                |                    |            |      |        |          |      |        |       |      |      |          |     |       |  |   |  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |  |                |                    |         |     |     |               |     |     |               |      |        |               |      |      |               |      |     |                    |     |        |  |   |  |
| ▪ Gasoline                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | 64.9                                                                         | 59.1 ▼                                                                                 |                      |         |      |      |                     |      |      |             |      |        |               |     |     |         |     |     |         |     |     |         |     |     |  |   |  |                                                                                                                                                                                                                                                                                                                                                             |  |                |                    |            |      |        |          |      |        |       |      |      |          |     |       |  |   |  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |  |                |                    |         |     |     |               |     |     |               |      |        |               |      |      |               |      |     |                    |     |        |  |   |  |
| ▪ Diesel                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | 21.4                                                                         | 15.2 ▼                                                                                 |                      |         |      |      |                     |      |      |             |      |        |               |     |     |         |     |     |         |     |     |         |     |     |  |   |  |                                                                                                                                                                                                                                                                                                                                                             |  |                |                    |            |      |        |          |      |        |       |      |      |          |     |       |  |   |  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |  |                |                    |         |     |     |               |     |     |               |      |        |               |      |      |               |      |     |                    |     |        |  |   |  |
| ▪ LPG                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | 13.6                                                                         | 17.0                                                                                   |                      |         |      |      |                     |      |      |             |      |        |               |     |     |         |     |     |         |     |     |         |     |     |  |   |  |                                                                                                                                                                                                                                                                                                                                                             |  |                |                    |            |      |        |          |      |        |       |      |      |          |     |       |  |   |  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |  |                |                    |         |     |     |               |     |     |               |      |        |               |      |      |               |      |     |                    |     |        |  |   |  |
| ▪ Hybrid                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | 0.0                                                                          | 8.7 ▲                                                                                  |                      |         |      |      |                     |      |      |             |      |        |               |     |     |         |     |     |         |     |     |         |     |     |  |   |  |                                                                                                                                                                                                                                                                                                                                                             |  |                |                    |            |      |        |          |      |        |       |      |      |          |     |       |  |   |  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |  |                |                    |         |     |     |               |     |     |               |      |        |               |      |      |               |      |     |                    |     |        |  |   |  |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | %                                                                            |                                                                                        |                      |         |      |      |                     |      |      |             |      |        |               |     |     |         |     |     |         |     |     |         |     |     |  |   |  |                                                                                                                                                                                                                                                                                                                                                             |  |                |                    |            |      |        |          |      |        |       |      |      |          |     |       |  |   |  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |  |                |                    |         |     |     |               |     |     |               |      |        |               |      |      |               |      |     |                    |     |        |  |   |  |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | New car buyers                                                               | Purchase intenders                                                                     |                      |         |      |      |                     |      |      |             |      |        |               |     |     |         |     |     |         |     |     |         |     |     |  |   |  |                                                                                                                                                                                                                                                                                                                                                             |  |                |                    |            |      |        |          |      |        |       |      |      |          |     |       |  |   |  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |  |                |                    |         |     |     |               |     |     |               |      |        |               |      |      |               |      |     |                    |     |        |  |   |  |
| ▪ 800cc                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | 5.1                                                                          | 0.7                                                                                    |                      |         |      |      |                     |      |      |             |      |        |               |     |     |         |     |     |         |     |     |         |     |     |  |   |  |                                                                                                                                                                                                                                                                                                                                                             |  |                |                    |            |      |        |          |      |        |       |      |      |          |     |       |  |   |  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |  |                |                    |         |     |     |               |     |     |               |      |        |               |      |      |               |      |     |                    |     |        |  |   |  |
| ▪ 1000-1500cc                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | 9.8                                                                          | 8.6                                                                                    |                      |         |      |      |                     |      |      |             |      |        |               |     |     |         |     |     |         |     |     |         |     |     |  |   |  |                                                                                                                                                                                                                                                                                                                                                             |  |                |                    |            |      |        |          |      |        |       |      |      |          |     |       |  |   |  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |  |                |                    |         |     |     |               |     |     |               |      |        |               |      |      |               |      |     |                    |     |        |  |   |  |
| ▪ 1600-1900cc                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | 18.5                                                                         | 10.4 ▼                                                                                 |                      |         |      |      |                     |      |      |             |      |        |               |     |     |         |     |     |         |     |     |         |     |     |  |   |  |                                                                                                                                                                                                                                                                                                                                                             |  |                |                    |            |      |        |          |      |        |       |      |      |          |     |       |  |   |  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |  |                |                    |         |     |     |               |     |     |               |      |        |               |      |      |               |      |     |                    |     |        |  |   |  |
| ▪ 2000-2500cc                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | 49.2                                                                         | 49.5                                                                                   |                      |         |      |      |                     |      |      |             |      |        |               |     |     |         |     |     |         |     |     |         |     |     |  |   |  |                                                                                                                                                                                                                                                                                                                                                             |  |                |                    |            |      |        |          |      |        |       |      |      |          |     |       |  |   |  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |  |                |                    |         |     |     |               |     |     |               |      |        |               |      |      |               |      |     |                    |     |        |  |   |  |
| ▪ 2600-2900cc                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | 10.0                                                                         | 8.8                                                                                    |                      |         |      |      |                     |      |      |             |      |        |               |     |     |         |     |     |         |     |     |         |     |     |  |   |  |                                                                                                                                                                                                                                                                                                                                                             |  |                |                    |            |      |        |          |      |        |       |      |      |          |     |       |  |   |  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |  |                |                    |         |     |     |               |     |     |               |      |        |               |      |      |               |      |     |                    |     |        |  |   |  |
| ▪ More than 3000cc                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | 7.3                                                                          | 22.1 ▲                                                                                 |                      |         |      |      |                     |      |      |             |      |        |               |     |     |         |     |     |         |     |     |         |     |     |  |   |  |                                                                                                                                                                                                                                                                                                                                                             |  |                |                    |            |      |        |          |      |        |       |      |      |          |     |       |  |   |  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |  |                |                    |         |     |     |               |     |     |               |      |        |               |      |      |               |      |     |                    |     |        |  |   |  |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | %                                                                            |                                                                                        |                      |         |      |      |                     |      |      |             |      |        |               |     |     |         |     |     |         |     |     |         |     |     |  |   |  |                                                                                                                                                                                                                                                                                                                                                             |  |                |                    |            |      |        |          |      |        |       |      |      |          |     |       |  |   |  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |  |                |                    |         |     |     |               |     |     |               |      |        |               |      |      |               |      |     |                    |     |        |  |   |  |

\* New car buyers between July 07 - June '08, 10,510 persons

\*\* Purchase intenders within next two years, 28,082 persons

## 10. Purchased vs. Preferred Vehicles [New car buyers within past one year vs. Purchase intenders within next two years]

- Body color of recently purchased vehicle was most frequently 'Black', followed by 'Silver', and 'Gray'.  
The most preferred color of intended vehicle was 'Black', which is related to high preference for large cars.
- 'Gray' and 'Light gray' were most often the interior color of recently purchased vehicles.  
A relatively high percentage of intenders preferred 'Ivory' and 'Beige' for interior.
- Neutral color such as 'Black', 'Gray' and 'Dark gray' were most often the seat color of recently purchased vehicles.  
A relatively high percentage of intenders preferred 'Ivory' and 'Beige' for seats as well.

### Vehicle body color

Q) 4. What is the body color of the vehicle you purchased/intend to purchase?

|          | New car buyers | Purchase intenders |
|----------|----------------|--------------------|
| ▪ Black  | 27.5           | 33.4 ▲             |
| ▪ Silver | 21.8           | 14.9 ▼             |
| ▪ Gray   | 20.3           | 15.7 ▼             |
| ▪ White  | 11.8           | 11.1               |
| ▪ Pearl  | 9.1            | 9.8                |
| ▪ Blue   | 4.4            | 6.5                |
| ▪ Red    | 2.9            | 3.1                |
| ▪ Green  | 0.8            | 1.4                |
| ▪ Gold   | 0.6            | 1.8                |
| ▪ Other  | 0.7            | 2.3                |
|          | %              |                    |

### Vehicle interior color

Q) 5. What is the interior (ceiling) color of the vehicle you purchased/intend to purchase?

|                    | New car buyers | Purchase intenders |
|--------------------|----------------|--------------------|
| ▪ Gray             | 27.9           | 22.3 ▼             |
| ▪ Bright gray      | 19.6           | 11.6 ▼             |
| ▪ Beige            | 16.3           | 20.4               |
| ▪ Dark gray        | 14.0           | 12.2               |
| ▪ Deep gray        | 8.6            | 4.9                |
| ▪ Ivory            | 8.2            | 20.5 ▲             |
| ▪ Deep beige       | 2.6            | 6.2                |
| ▪ Don't know/Other | 2.7            | 1.9                |
|                    | %              |                    |

### Vehicle seat color

Q) 6. What is the seat color of the vehicle you purchased/intend to purchase?

|              | New car buyers | Purchase intenders |
|--------------|----------------|--------------------|
| ▪ Black      | 29.0           | 16.2 ▼             |
| ▪ Gray       | 19.9           | 17.2               |
| ▪ Dark gray  | 18.2           | 12.2 ▼             |
| ▪ Light gray | 13.5           | 11.1               |
| ▪ Beige      | 9.6            | 16.4 ▲             |
| ▪ Ivory      | 2.9            | 11.6 ▲             |
| ▪ Dark Ivory | 2.9            | 8.6 ▲              |
| ▪ Red        | 1.1            | 1.3                |
| ▪ Blue       | 0.7            | 2.0                |
| ▪ Other      | 2.1            | 3.5                |
|              | %              |                    |

\* New car buyers between July 07 - June '08, 10,510 persons

\*\* Purchase intenders within next two years, 28,082 persons