

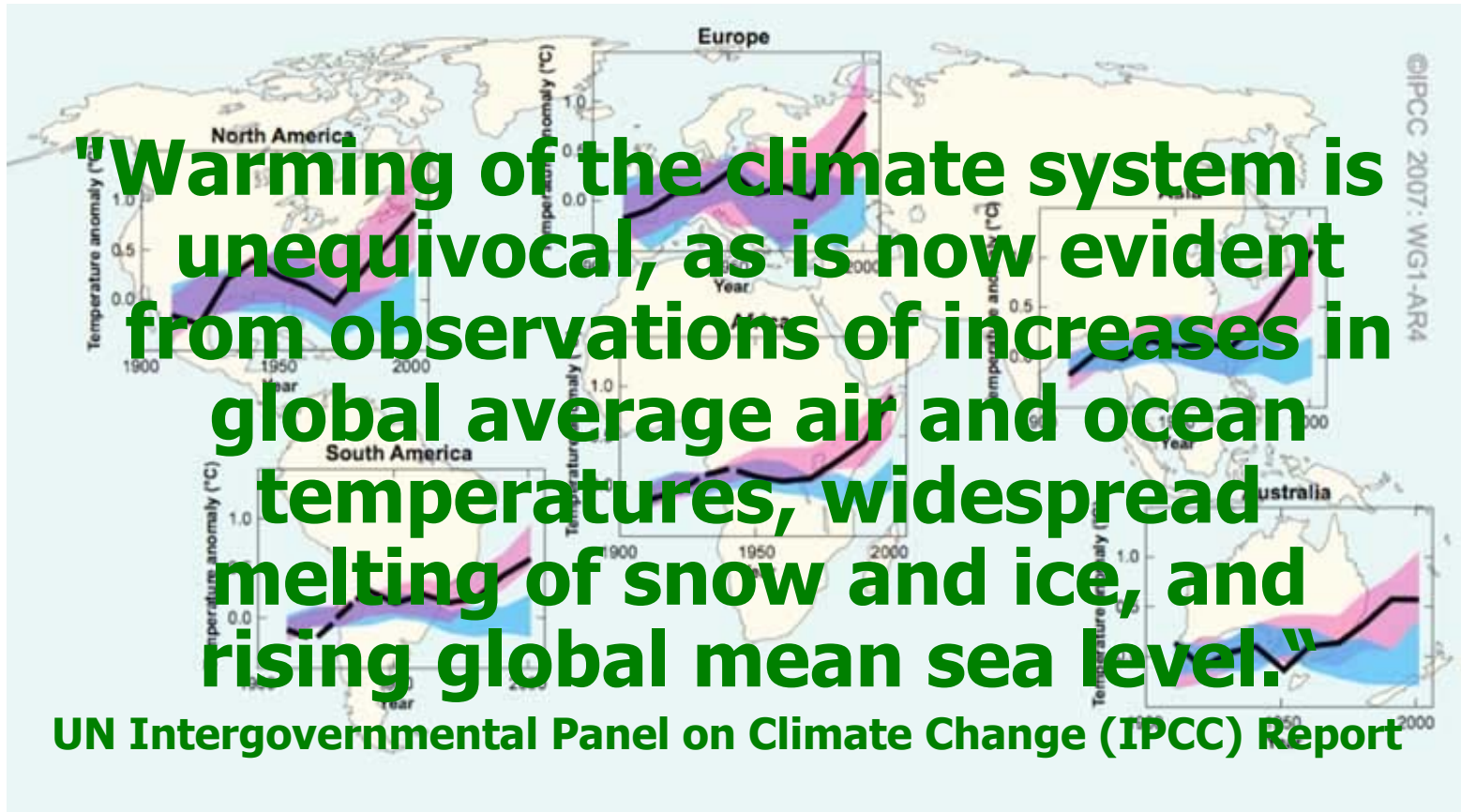
Maritz Research Key Findings Dealer and Consumer Survey

Automotive News Europe
New Power Train Technologies Conference
28 March, 2007
RAI Convention Centre
Amsterdam

The way in which we live will be changed

"Warming of the climate system is unequivocal, as is now evident from observations of increases in global average air and ocean temperatures, widespread melting of snow and ice, and rising global mean sea level."

UN Intergovernmental Panel on Climate Change (IPCC) Report



APT have yet to cross over to the mainstream

- A significant reduction in fuel consumption can be made with available and emerging technologies.
- The auto industry has developed impressive technology over the past two decades to make engines and power trains more efficient and to trim weight from components.



What's in there for me?

“People act as though the hybrid could solve all of our problems - which is certainly not the case. And you must not forget that we are a business enterprise.”

Martin Winterkorn
CEO Volkswagen Group

Key action driver

- Regulation (European Cafe)
- Market Needs (Customer wants & needs, Fuel Costs)

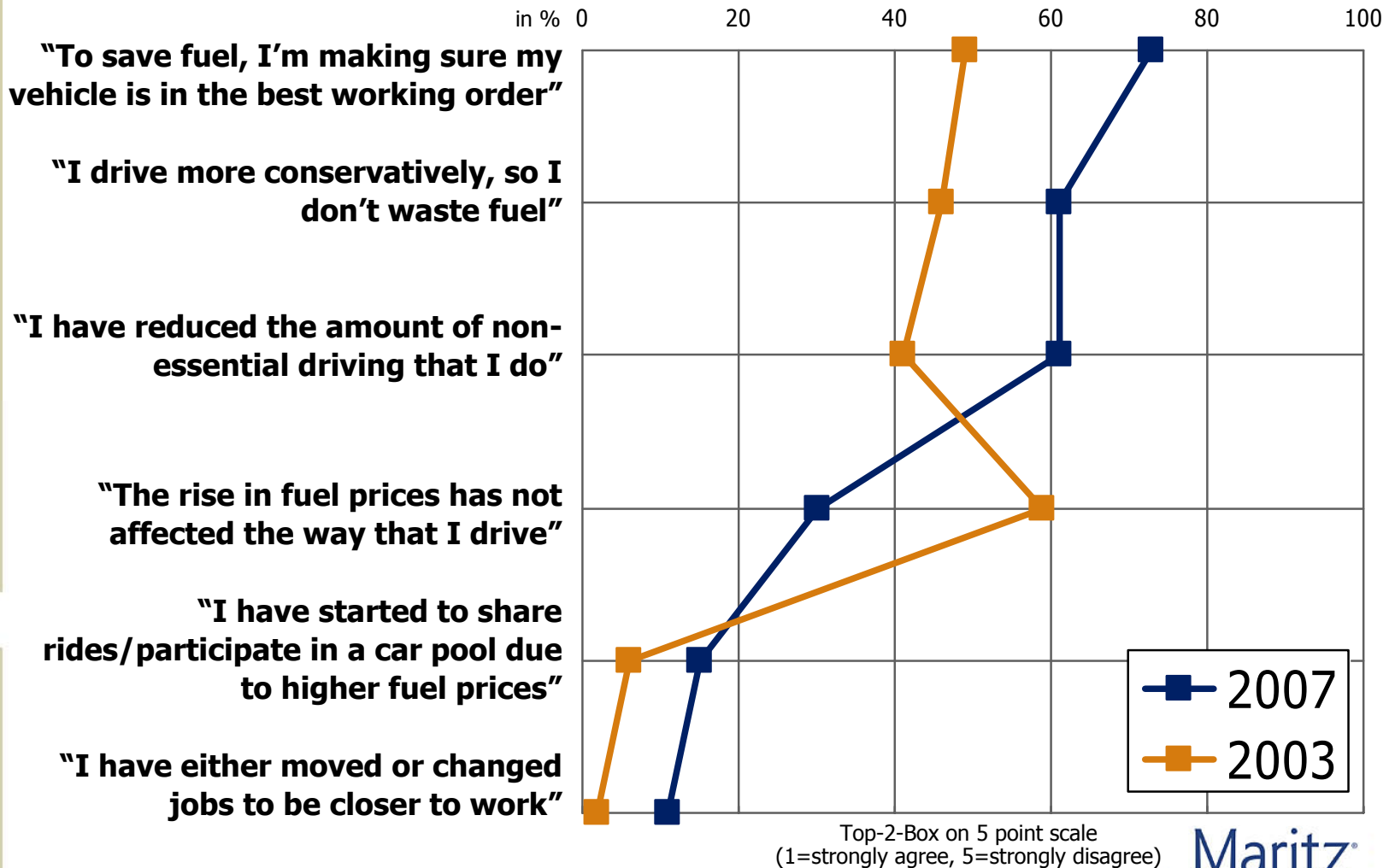


Are consumers ready for the party?

- Surveys conducted amongst new car buyers and car dealerships to identify and assess:
 - Consumer habits
 - Awareness of APT
 - Relevance of APT
 - Consideration of APT
 - Current and future expectations
- Sample sizes:
 - 1,240 new car buyers
 - 1,250 car dealerships

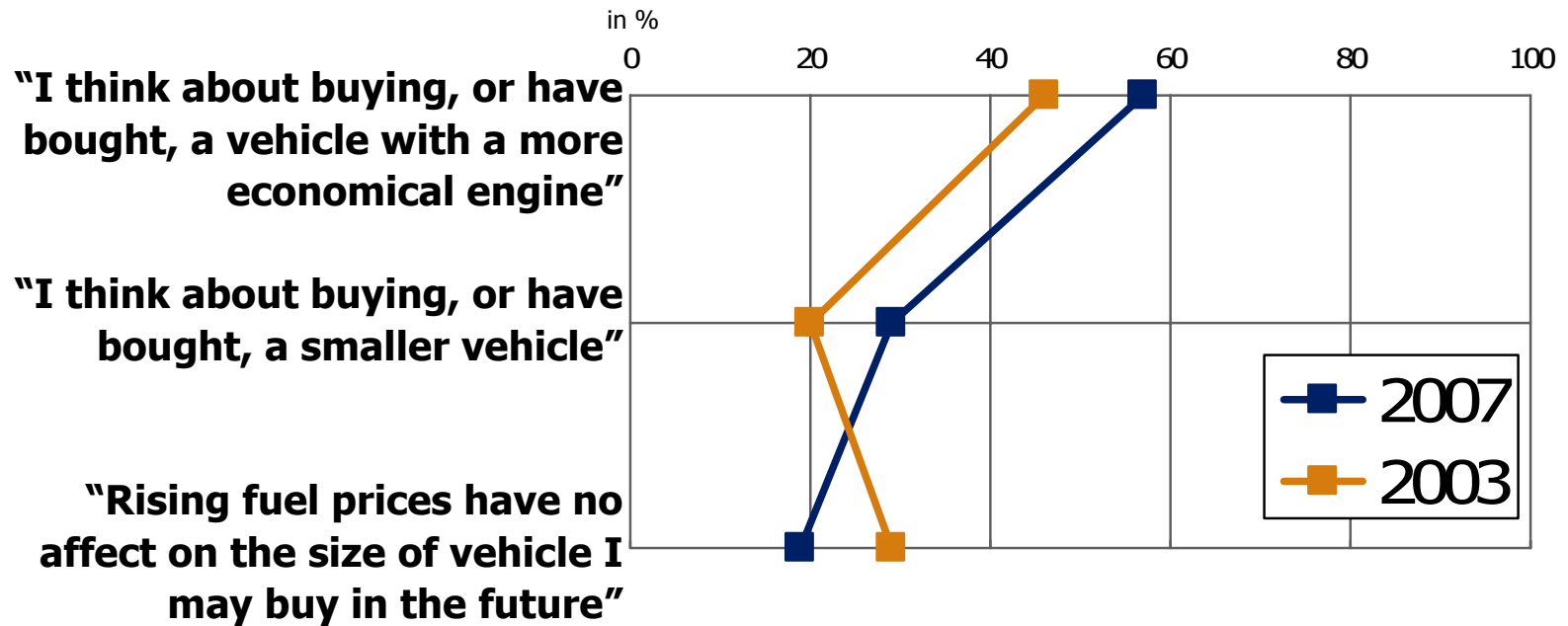


Changes in Driving Habits



Source: Maritz Research New Car Buyer Survey in Germany, UK, France (n=1,240)

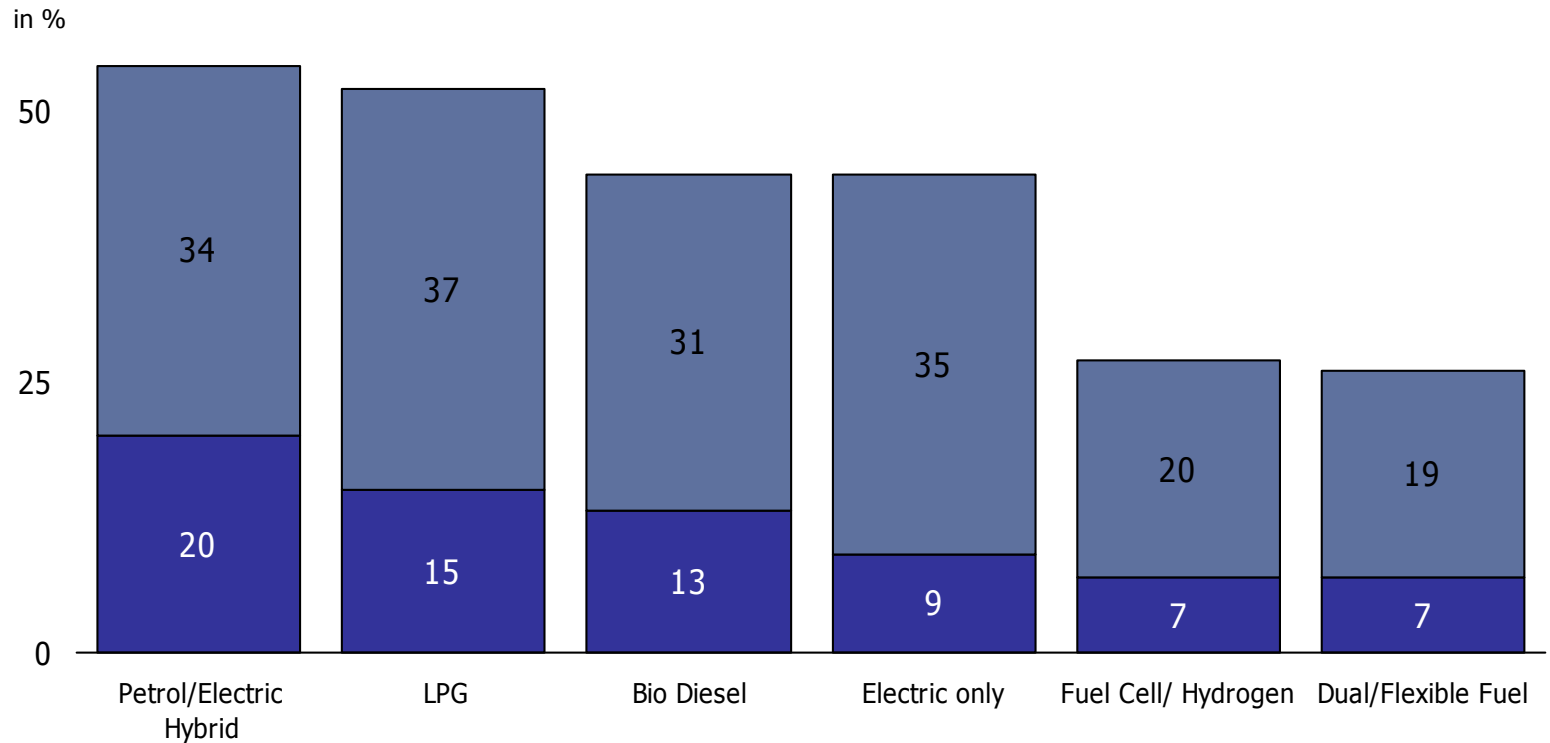
Changes in Purchase Consideration



Top-2-Box on 5 point scale
(1=strongly agree, 5=strongly disagree)

Awareness

Awareness of APT's

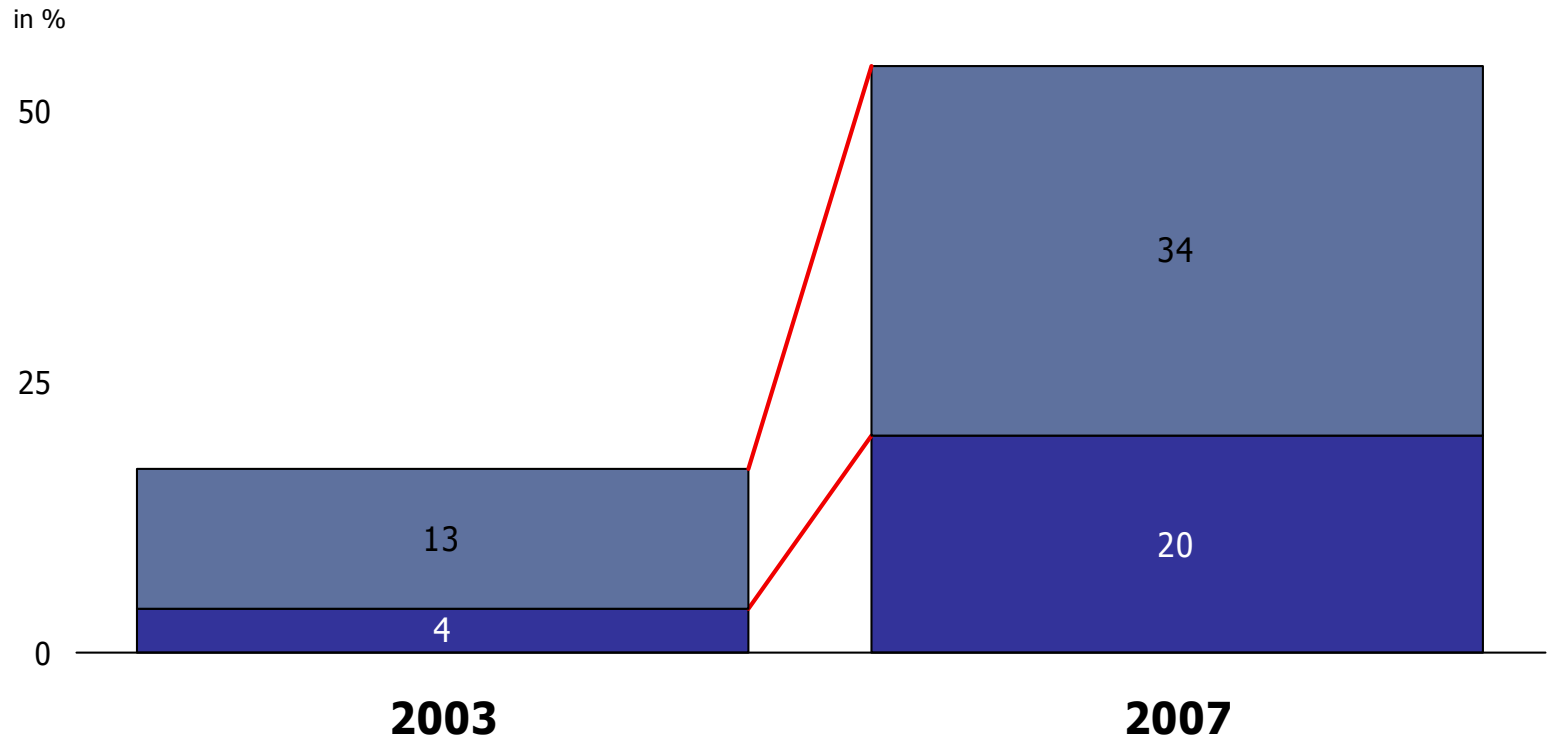


Top-2-Box: Very/somewhat familiar

Source: Maritz Research New Car Buyer Survey in Germany, UK, France (n=1,240)

Awareness (r)evolution of hybrid technology

... but detailed knowledge is still very low (video)



Top-2-Box: Very/somewhat familiar with hybrid engines

Sources:

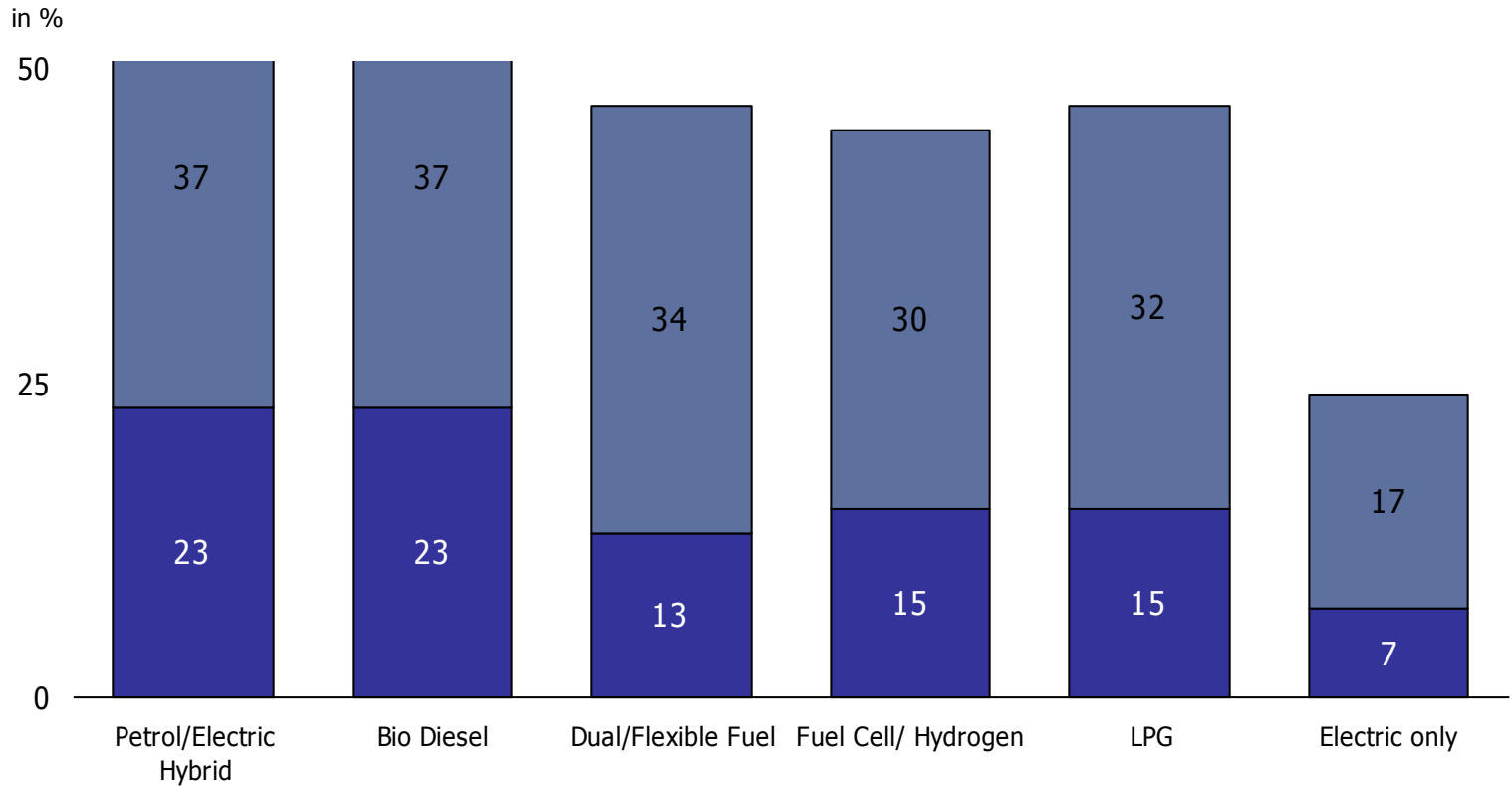
2007 Maritz Research New Car Buyer Survey in Germany, UK, France (n=1,240)

2003 Maritz Research New Car Buyer Survey in Germany, UK, France, Italy, Spain (n= 1,306)

Consideration

Strongest consideration of Hybrid and Bio Diesel

Consideration for next vehicle purchase

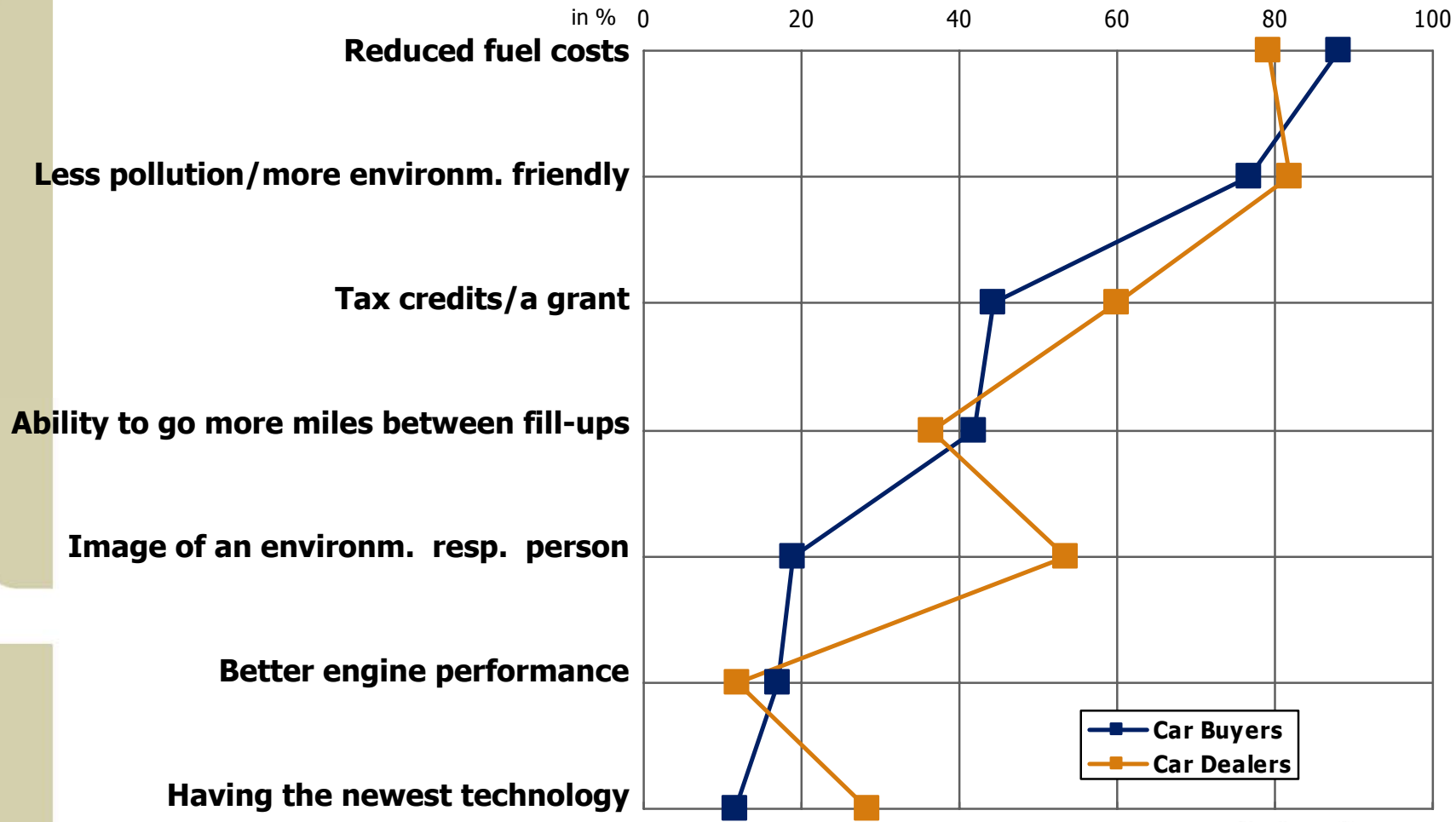


Top-2-Box: Strongly consider / consider

Source: Maritz Research New Car Buyer Survey in Germany, UK, France (n=1,240)

Top reasons for consideration of APT's

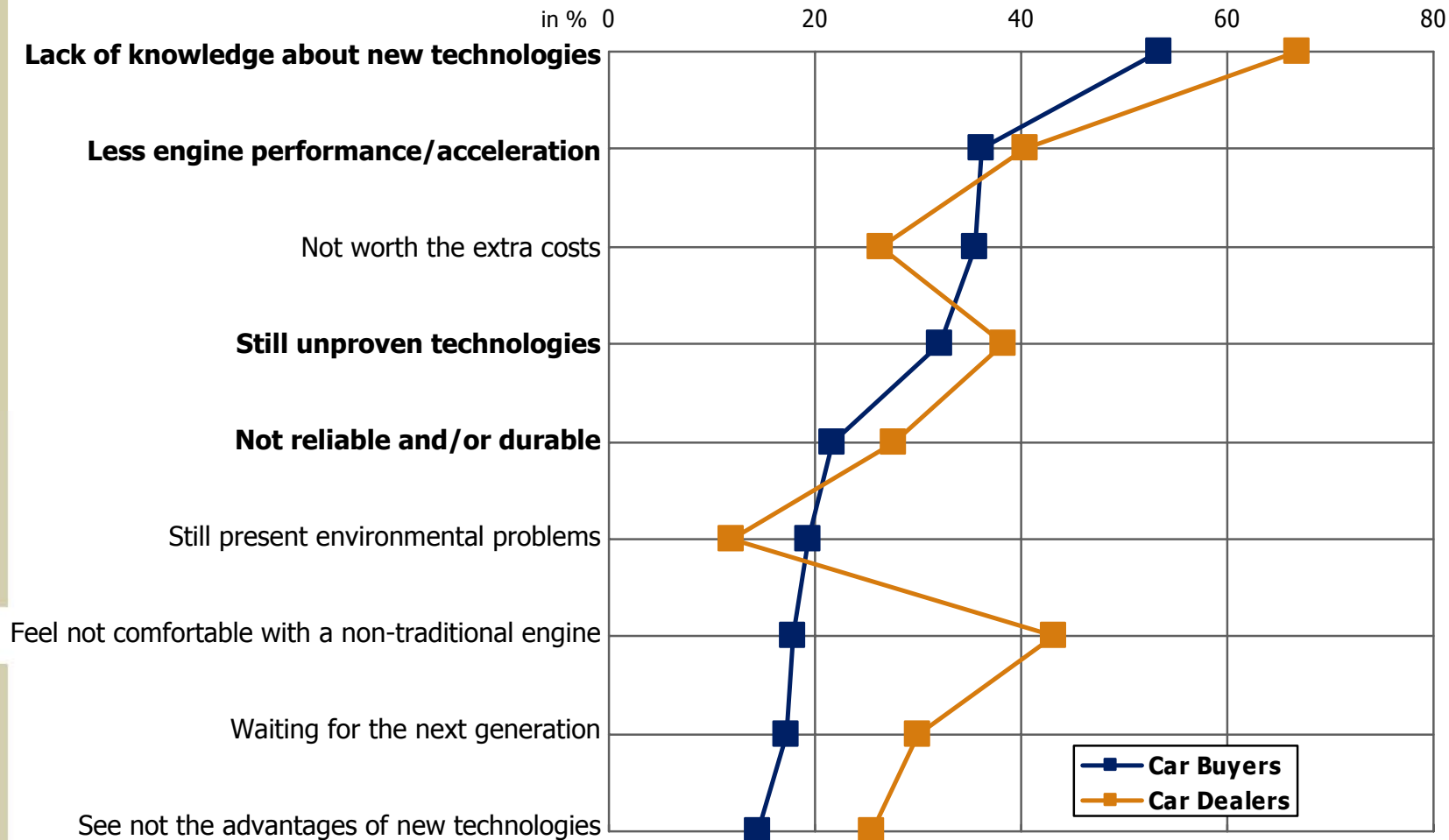
Reasons for buying vehicles with new new power train/alternative fuel technologies



Source: Maritz Research New Car Buyer Survey in Germany, UK, France (n=1,240) and Car Dealer Survey in Germany, UK, France, Italy, Spain (n=1,250)

Key barriers

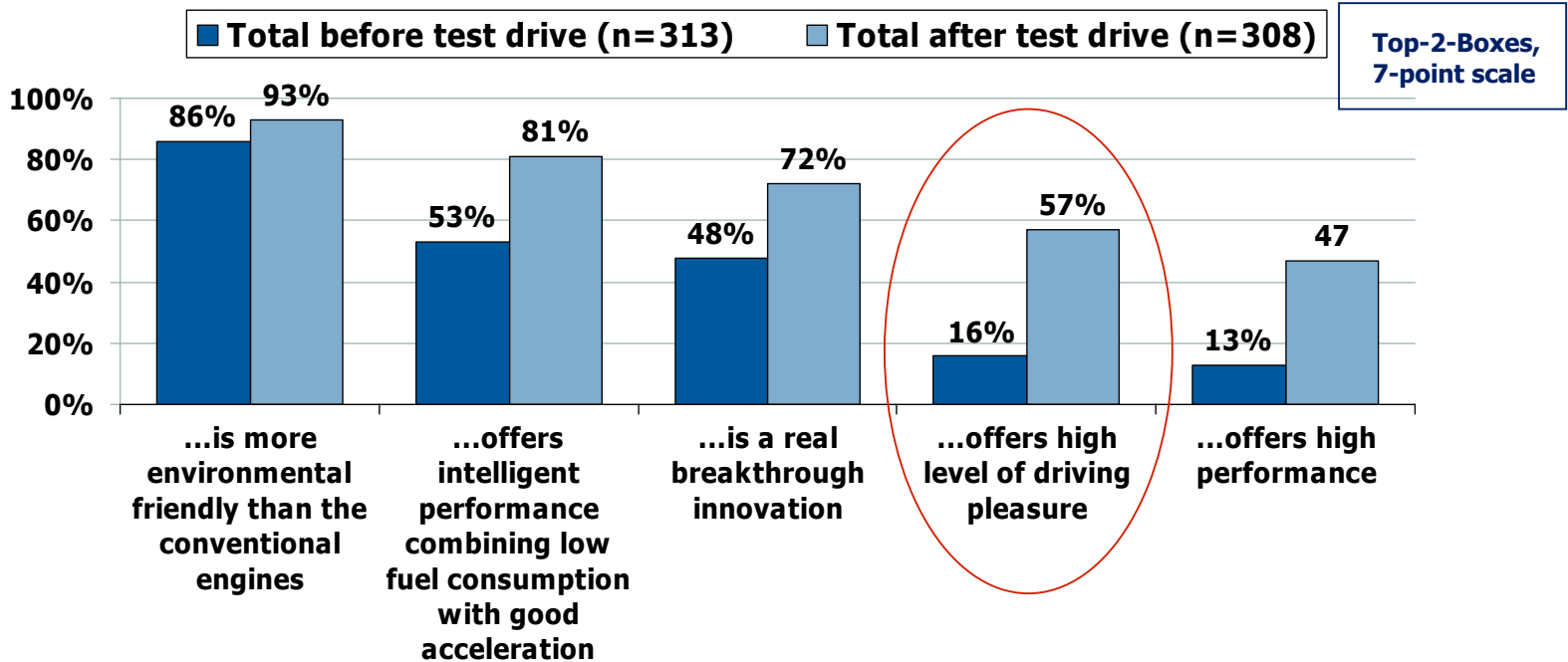
Reasons for not buying vehicles with new new power train/alternative fuel technologies



Source: Maritz Research New Car Buyer Survey in Germany, UK, France (n=1,240) and Car Dealer Survey in Germany, UK, France, Italy, Spain (n=1,250)

Experience is the driver of interest

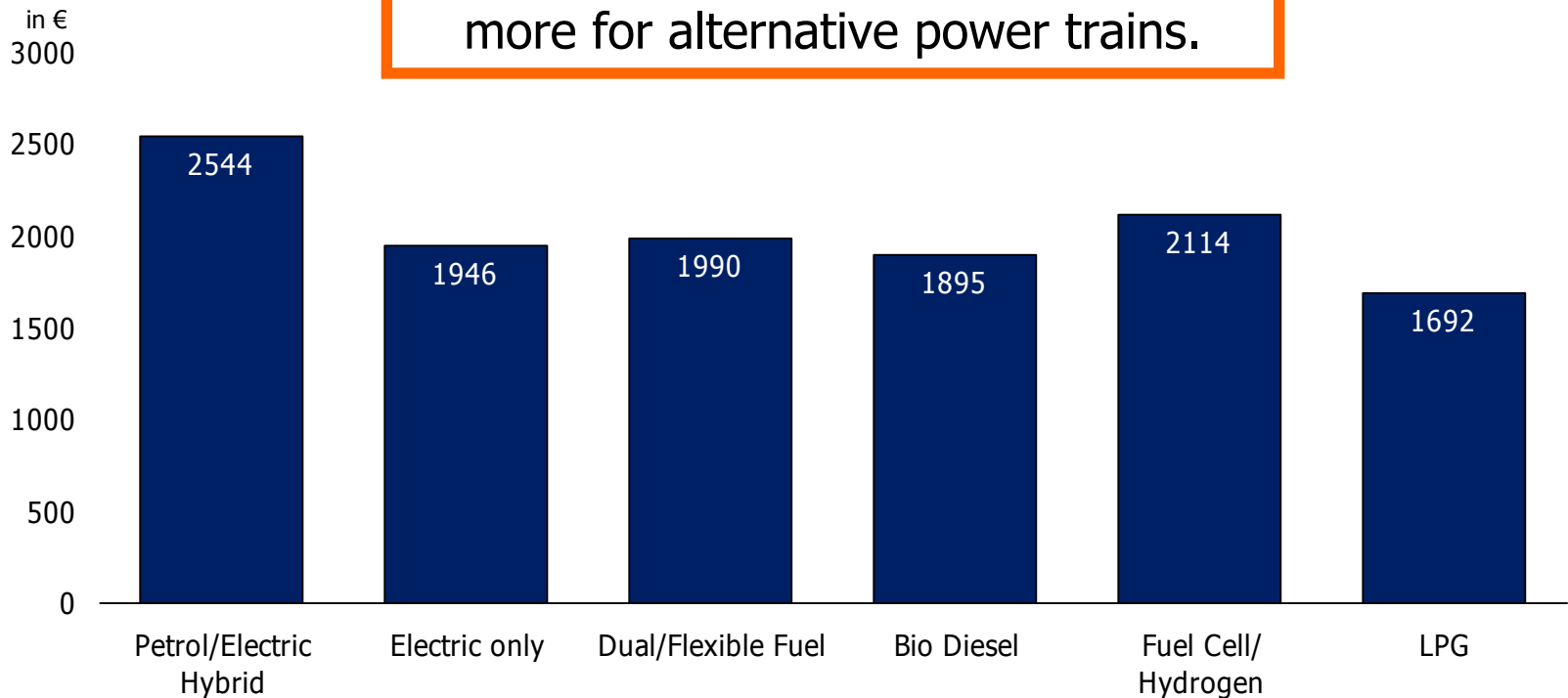
Opinions about Hybrid Technology - Pre- and Post Driving



Customers are willing to pay a premium – and dealers agree they can sell it for more

Willingness to pay more for new engine/fuel technologies

Dealers estimated that consumers are willing to pay 1,377 € on average more for alternative power trains.



Source: Maritz Research New Car Buyer Survey in Germany, UK, France (n=1,240) and Car Dealer Survey in Germany, UK, France, Italy, Spain (n=1,250)

So are consumers ready?

- Awareness, but limited knowledge
- Increasing consideration, but continuing uncertainties
 - Lack of detailed product information
 - Cost of purchase and cost of ownership
 - Engine Performance/Driving Pleasure doubts

Communication Needs

- Communication to customers
- Communication to dealers

Marketing

- From a product focused “environmental friendly” positioning to a more mature, customer focused positioning
- From a “green car” to a “great car”



- Performance emphasis on increase of dynamic low torque vs. high power (“Fun-to-Drive”)

Channel Communication & Education

- More information needed
 - Sales Training
 - Information about costs (incl. benefits and possible penalties)
 - Information about existing technologies
 - Information about products in the brand portfolio
 - Information about future plans

Increasing relevance in the sales process

During the last 12 months, on average 13.7% of customers of car dealerships actively asked for information about alternative power trains during a sales conversation.

Back to our questions!

What's in there for me?

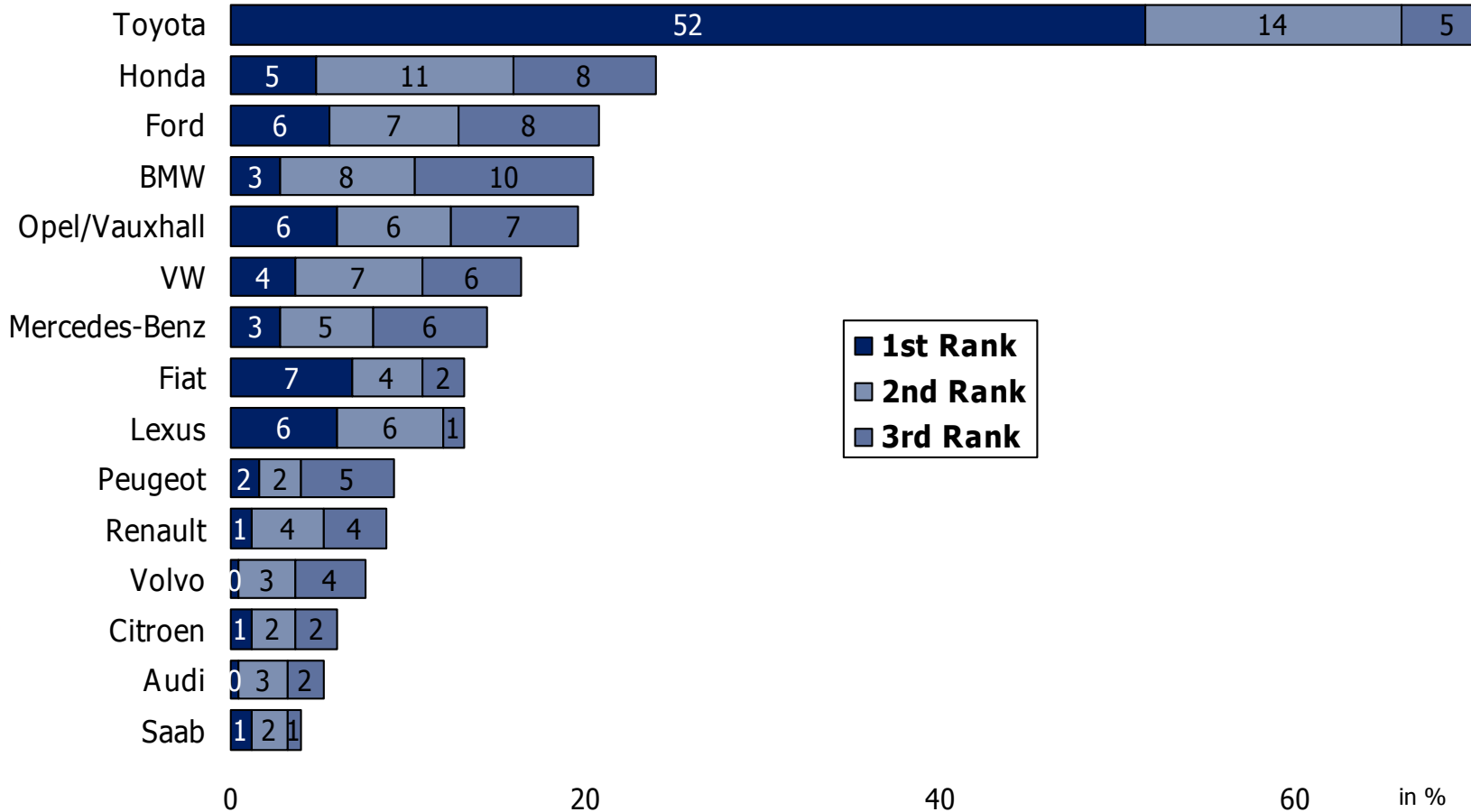
Are "hybrids" the future?

The right questions?

What's the right question?

- Some might still question if APT (hybrids and beyond) is a winning theme...
- **... but it can well be a losing game if you don't play it!**

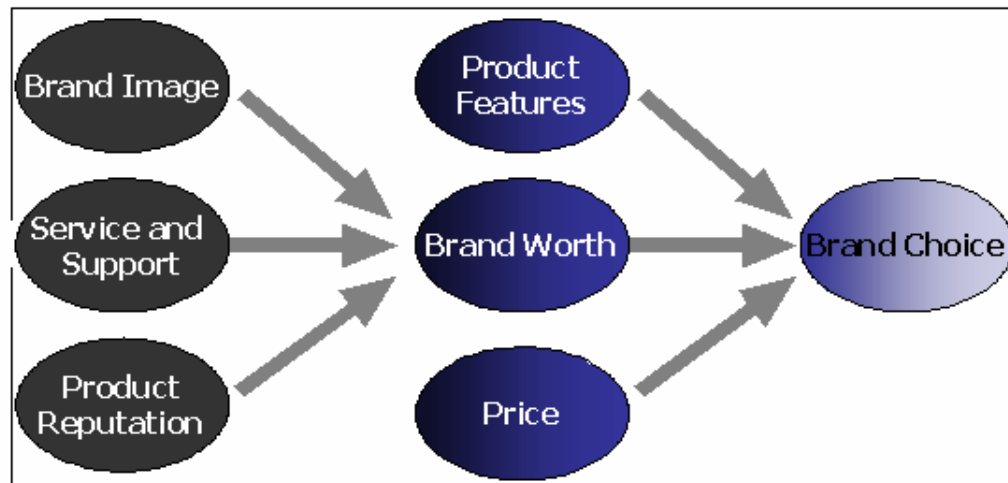
The driving force behind APT developments



Source: Maritz Research Dealer Survey in Germany, UK, France, Italy, Spain (n=1,250)

Contribution to Brand Equity & Choice

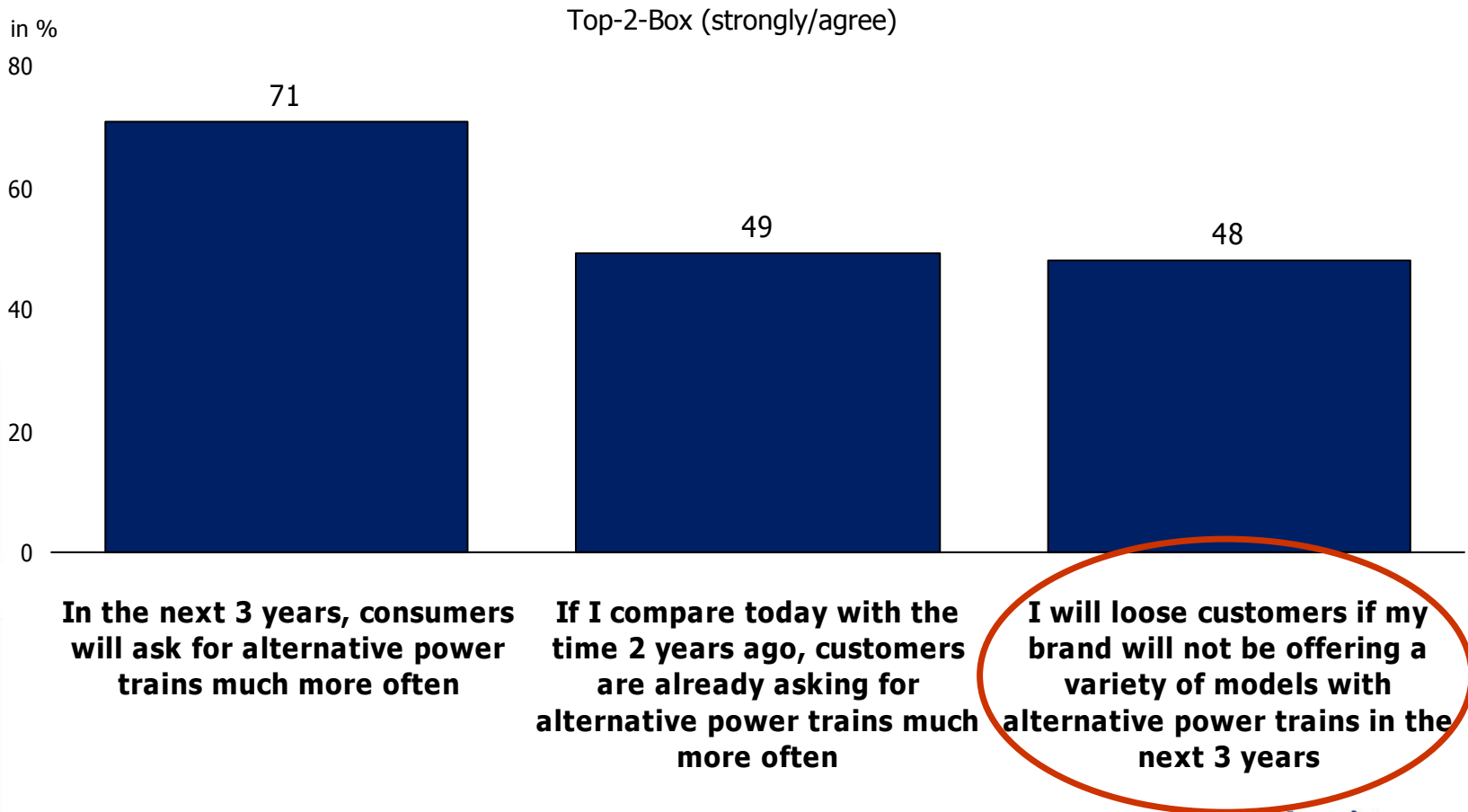
- Brand worth, in € terms, relative to each competitor
- Contributions of image attributes to brand equity
 - How much € does “is a leader in environmental engine technologies” contribute?



Data Fusion

Dealers see APT as essential for their future health

Attitudes on development of alternative power trains



Source: Maritz Research Dealer Survey in Germany, UK, France, Italy, Spain (n=1,250)

Don't stand still



Thank you for listening!