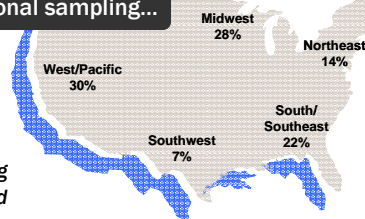


National sampling...



## Reshaping the Automotive Dealership Experience – An Opportunity for Vehicle Manufacturers!

Michigan based Market Research firm Intellitrends conducted an online survey in May, 2009 among n=300 U.S. women business owners about their plans to purchase a vehicle, factors that influenced their decision and the role of the dealership. The national sampling reflects a +/- 5.6% error margin @95% confidence.

Women business owners are a significant economic force in the today's economy. In the U.S. today, almost one in three businesses is run by a woman representing an estimated 7.7 million majority women-owned businesses generating over \$165 billion in sales.

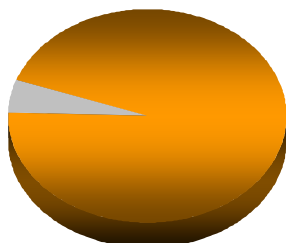
When these women were asked "Who makes the final decisions?" on major purchases from choice of home to financial investments to appliances and child-care, 70% of these women cited *they alone* make the final decision for their *vehicle* versus with a spouse or partner. Next to shopping for *electronics* (i.e., cell phone, PDA, laptop), choice of *vehicle* was the second highest decision made alone by these women – and the automotive dealership plays a primary role in this decision process...

**70%**

of women business owners in the U.S. say *they alone* make the final purchase decision for their vehicle vs. with a spouse or partner!

Location and word of mouth are primary in a women's choice of dealership...

Experience at the Dealership is a critical influencer in the shopping process...



**95%** of women business owners say they use a dealership to purchase a vehicle!

**81%** say their "overall experience at the dealership" is very to extremely important

**89%** say "test driving the vehicle" is very to extremely important

**74%** say when shopping for a vehicle "a knowledgeable salesperson" is very to extremely important

How do you typically select a dealership to work with when purchasing a vehicle? BASE: Women who use a dealership





**Fuel efficiency, comfort and safety top the list in the purchase decision!**

Half of the women surveyed say they will be buying/leasing a vehicle within the next 5 years with 4 door sedan styles being most popular followed by SUVs. Fuel efficiency, comfort of the vehicle and safety ratings are considered the three most important factors in the *vehicle purchase* decision and should be factors that every dealership sales person should know about their own brand as well as competitive brands.

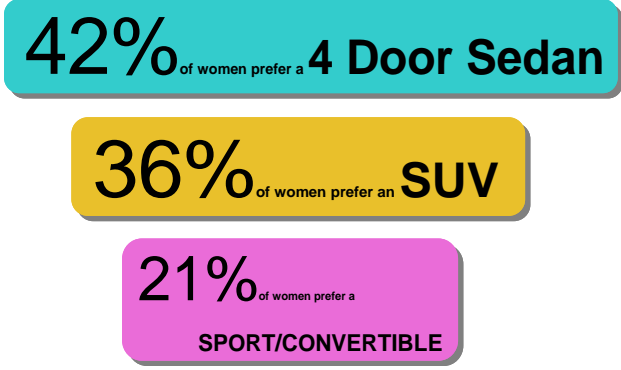
While fourth in ranking, but perhaps even more significant, "past experience with the brand" was cited by 59% of these female buyers. Vehicle manufacturers who understand their brand's perceptual market position and map the customer's interaction and critical touch points with their brand, can effectively manage gaps and close points of customer defection. From the initial dealership shopping and purchasing experience through delivery and on-going customer maintenance, this understanding can positively impact and drive "referrals from someone I trust" - another key influencer among today's female vehicle buyer.

*What is most important to you when purchasing a vehicle? (multi-response)*



**1 in 2 women business owners say they are planning to buy/lease a vehicle within the next 5 years...**

↓ *What type of vehicle do you prefer?*



**Vehicle Brand Preferences cited by women business owners...**

*What vehicle brand(s) do you prefer? (multiple response allowed)*

- 67% Toyota
- 49% GM
- 36% Honda
- 35% Ford
- 27% BMW
- 21% Volkswagen
- 19% Chrysler
- 18% Mercedes-Benz
- 17% Nissan
- 14% Tata Motors
- 7% Hyundai-Kia
- 6% Mazda
- 6% Porsche
- 2% Mitsubishi