

# AUTOTECHCAST EUROPE

Advanced Automotive Technologies Forecast



NEW TECHNOLOGY CONSUMER ACCEPTANCE MONITORING SYSTEM



## UNDERSTANDING AUTOMOTIVE CONSUMER TECHNOLOGY ADOPTION & FUTURE PURCHASE BEHAVIOR

Harris Interactive's AUTOTECHCAST EUROPEAN study provides OEM vehicle manufacturers and Tier 1, 2 and 3 suppliers with in-depth European consumer research on more than 60 advanced automotive technologies utilizing the power of its multi-million member, Internet-based Harris Poll OnlineSM. This highly-accurate research engine delivers superior data integrity, detailed consumer demographics and reporting flexibility to clients around the world.

Conducted in two seasonal waves, AUTOTECHCAST EUROPE measures over 20,000 consumers' knowledge of advanced technologies, "willingness to purchase" and system/component purchase price data. Utilizing a randomly-drawn, demographic representative consumer sample, AUTOTECHCAST EUROPE accurately forecasts technology usage and purchase patterns across all European vehicle segments in France, Germany, Italy, Spain and the United Kingdom.

AUTOTECHCAST EUROPE also provides detailed consumer demographic data for each of the technologies analyzed including current vehicle model, year acquired, method of purchase, consumer age, income, level of education, employment industry, household size and individual driving characteristics. AUTOTECHCAST EUROPE is a valuable strategic planning tool for automotive sales, marketing, engineering and research executives. With two waves of the study already completed in the U.S., direct comparisons can easily be made between each market.

Do consumers really want this technology?

What are they willing to pay for this product?

DO CONSUMERS REALLY WANT THIS TECHNOLOGY?

WHAT ARE THEY WILLING TO PAY FOR THIS PRODUCT?



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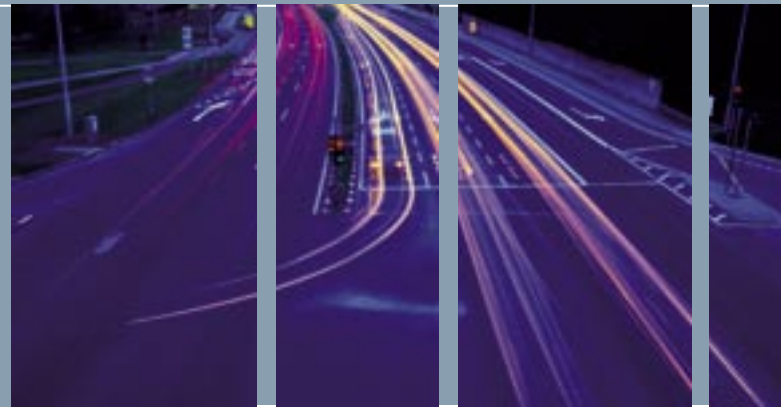
## TWO DIMENSIONAL CONSUMER SEGMENTATION

Designed by automotive industry experts, AUTOTECHCAST EUROPE also provides valuable consumer segmentation analysis. Armed with a thorough understanding of consumer technology adoption patterns combined with consumer socialization behaviors, AUTOTECHCAST EUROPE's proprietary methodology divides consumers into 25 distinct categories and provides deep analysis on key behavior and purchase drivers.

## SPECIALIZED DEEP DIVE CAPABILITIES

AUTOTECHCAST EUROPE's flexible Internet-based study platform allows clients to insert specialized questions into each wave to gain insights into proprietary technologies, systems or components. Specialized follow-up studies are also available to leverage existing AUTOTECHCAST EUROPE groups like TechSavvy, Socialites and Autophile respondents.

HIGH	TECHNOLOGY ADAPTATION	Anti-Social TechSavvy 1-5	Non-Social TechSavvy 2-5	Moderate Social TechSavvy 3-5	High Social TechSavvy 4-5	Socialite TechSavvy 5-5
		Anti-Social TechAdapter 1-4	Non-Social TechAdapter 2-4	Moderate Social TechAdapter 3-4	High Social TechAdapter 4-4	Socialite TechAdapter 5-4
		Anti-Social TechTester 1-3	Non-Social TechTester 2-3	Moderate Social TechTester 3-3	High Social TechTester 4-3	Socialite TechTester 5-3
		Anti-Social TechAvoider 1-2	Non-Social TechAvoider 2-2	Moderate Social TechAvoider 3-2	High Social TechAvoider 4-2	Socialite TechAvoider 5-2
		Anti-Social TechnoPhobe 1-1	Non-Social TechnoPhobe 2-1	Moderate Social TechnoPhobe 3-1	High Social TechnoPhobe 4-1	Socialite TechnoPhobe 5-1
LOW						
		LOW	DEGREE OF SOCIALIZATION	HIGH		



# AUTOTECHCAST EUROPE

## ADVANCED AUTOMOTIVE TECHNOLOGIES REPORT

### TECHNOLOGIES COVERED INCLUDE:

#### COMFORT & CONVENIENCE

Adjustable Gas & Brake Pedals  
Park-by-Wire



#### EXTERIOR

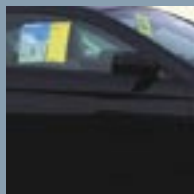
Advanced Windshield Washing Systems  
Invisible A-B-C Pillars  
Rain Sensor & Automatic Wipers

#### GLASS

Advanced Laminated Side Window Glass  
Advanced Tinted Glass

#### HVAC

Advanced Air Conditioning Systems  
Multi-Zone Thermoelectric HVAC Systems

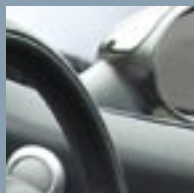


#### INTELLIGENT SENSING

Adaptive Cruise Control  
Blind Spot Detection & Warning  
Park Assist & Object Detection  
Passive & Activate Infra-Red Night Vision  
Rear of Vehicle Cameras

#### INTERIOR

Climate Controlled Seats – Heated & Cooled  
Dynamic Seating  
Pivoting Seats

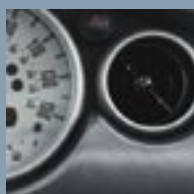


#### LIGHTING

Adaptive Headlamps  
Headlamp Cleaning Systems  
High-Performance Halogen & Xenon Lighting  
LED Lighting

#### NAVIGATION

Automated Driving Software  
Auto Parking Software  
Intelligent Navigation Systems  
Real Time Traffic Updates for Navigation  
Vehicle Navigation Projected Imaging



#### POWERTRAIN

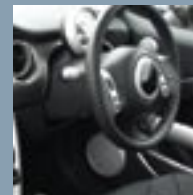
Enhanced Fuel Economy  
Fuel Cell Vehicles  
Hybrid Electric Vehicles  
Hydrogen Fueled Vehicles

#### RIDE AND HANDLING

Brake-by-Wire  
Four Wheel Steering  
Steer-by-Wire

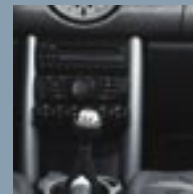
#### SAFETY

Child Left in Vehicle Warning  
Inflatable Seatbelts  
Lane Departure Warning & Aid  
Occupant Sensing for Intelligent Airbag Deployment  
Pedestrian Sensing & Protection Systems  
Pre-Crash Sensing  
Radar Enabled Collision Warning Systems  
Rollover Control & Protection  
Side Airbags & Electronics  
Voice/Fingerprint Vehicle Entry Systems



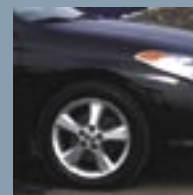
#### TELEMATICS, AUDIO & ENTERTAINMENT

Bluetooth Connectivity  
Concierge & Personal Assistance Services  
Digital Radio Systems  
Digital Surround Audio Systems  
Driver Recognition Systems  
Flexible Format Audio  
MP3/iPOD Audio System Interface  
Music Storage Drives (MP3)  
On-Board Personal Multimedia Systems  
Personal Gaming Systems  
Satellite Radio Systems  
Satellite Video Systems  
Vehicle & Home Connectivity Systems  
Voice Activated Controls & Features  
Wireless, Hands-Free Cell Phone



#### TIRES

Advanced Tire Pressure Monitoring Systems  
Airless Tires  
Self-Inflating Tires  
Smart Run-Flat Tires



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