


# CONSUMER RESPONSE TO CRASH TEST RATINGS

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- IIHS 2010 U.S. national telephone survey
  - 78 percent had seen vehicle safety ratings
  - 67 percent said ratings had been useful to them in choosing a vehicle
- Euro NCAP 2005 telephone survey
  - 47 percent looked up information on protection different car makes might provide in a crash
  - 34 percent said would likely use vehicle safety information from Euro NCAP when choosing next car

A news anchor in a dark suit and tie sits at a desk, looking towards the camera. On the desk is a mug with the CBS eye logo and the letters 'NE'. In the background, a television screen displays a crash test with the text 'CRASH TEST' at the top. The scene is dimly lit, typical of a news studio.

Television coverage:  
Small overlap crash tests

# IIHS top 5 video news release audiences

	date	viewers	broadcasts
Side impact crash tests – midsize cars	April 18, 2004	239 million	2,412
First side impact crash tests – small SUVs	June 17, 2003	234 million	2,316
Frontal crash tests – large pickups	June 4, 2001	213 million	1,855
First small overlap crash tests – midsize luxury cars	August 14, 2012	204 million	2,550
Children's booster seat ratings	December 22, 2009	183 million	3,669

SAFETY

## Forester Is a Standout in Latest Crash Test



The 2014 [Subaru Forester](#) was the only one of 13 compact crossovers and S.U.V.'s to earn the [highest rating](#) in a new, more severe front crash test by the [Insurance Institute for Highway Safety](#).

Subaru of Ameri

The Subaru Forester received the Insurance Institute for Highway Safety's highest rating in the small overlap crash test.

By CHERYL JENSEN

Published: May 16, 2013

The 2014 [Subaru Forester](#) was the only one of 13 compact crossovers and S.U.V.'s to earn the [highest rating](#) in a new, more severe front crash test by the [Insurance Institute for Highway Safety](#). The new Forester was rated Good, and the 2013 [Mitsubishi Outlander Sport](#) received the next-highest rating, Acceptable.

The insurance institute, which is financed by the insurance industry, began conducting the new test, called the small overlap test, in 2012. The results are rated on a scale of Good, Acceptable, Marginal and Poor. Vehicles are rated separately for their structure, for how well the driver dummy is restrained and for potential injuries to the dummy. Those are combined into the overall rating.

Moreover, the redesigned Forester was the first vehicle of 47 tested to date to receive perfect scores in all of those categories.

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**Enough Said**  
Coming Soon  
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# SWEDEN 1 GERMANY 0



The 2012 Volvo S60- the highest rated vehicle in the Insurance Institute for Highway Safety's new small overlap frontal crash test. The German guys? Well, let's just say that they didn't even come close.

5 YEAR WARRANTY - 5 YEAR SCHEDULED MAINTENANCE  
5 YEAR WEAR & TEAR • 5 YEAR ROADSIDE ASSISTANCE

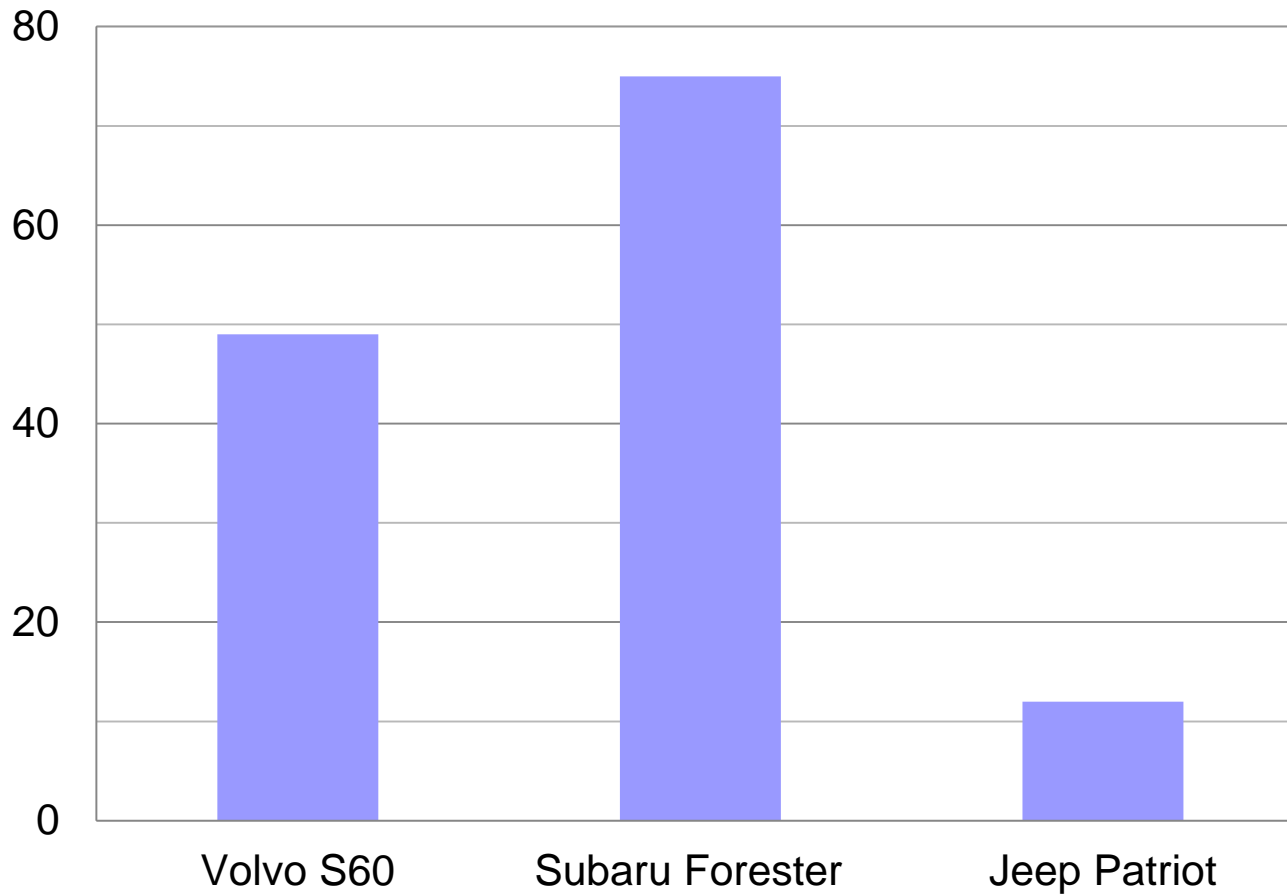
**SAFE + SECURE  
COVERAGE PLAN**

# Survey of dealerships after small overlap frontal crash test ratings announced

- Inaugural small overlap ratings announced August 14, 2012
  - Volvo S60 rated Good
  - Interviewed 206 Volvo dealers August 28-September 6
- Small SUV small overlap ratings announced May 16, 2013
  - Subaru Forester rated Good, Jeep Patriot rated Poor
  - Interviewed 275 Subaru dealers and 275 Jeep dealers June 17-July 16

# Increase in customers interested in purchasing vehicle since announcement

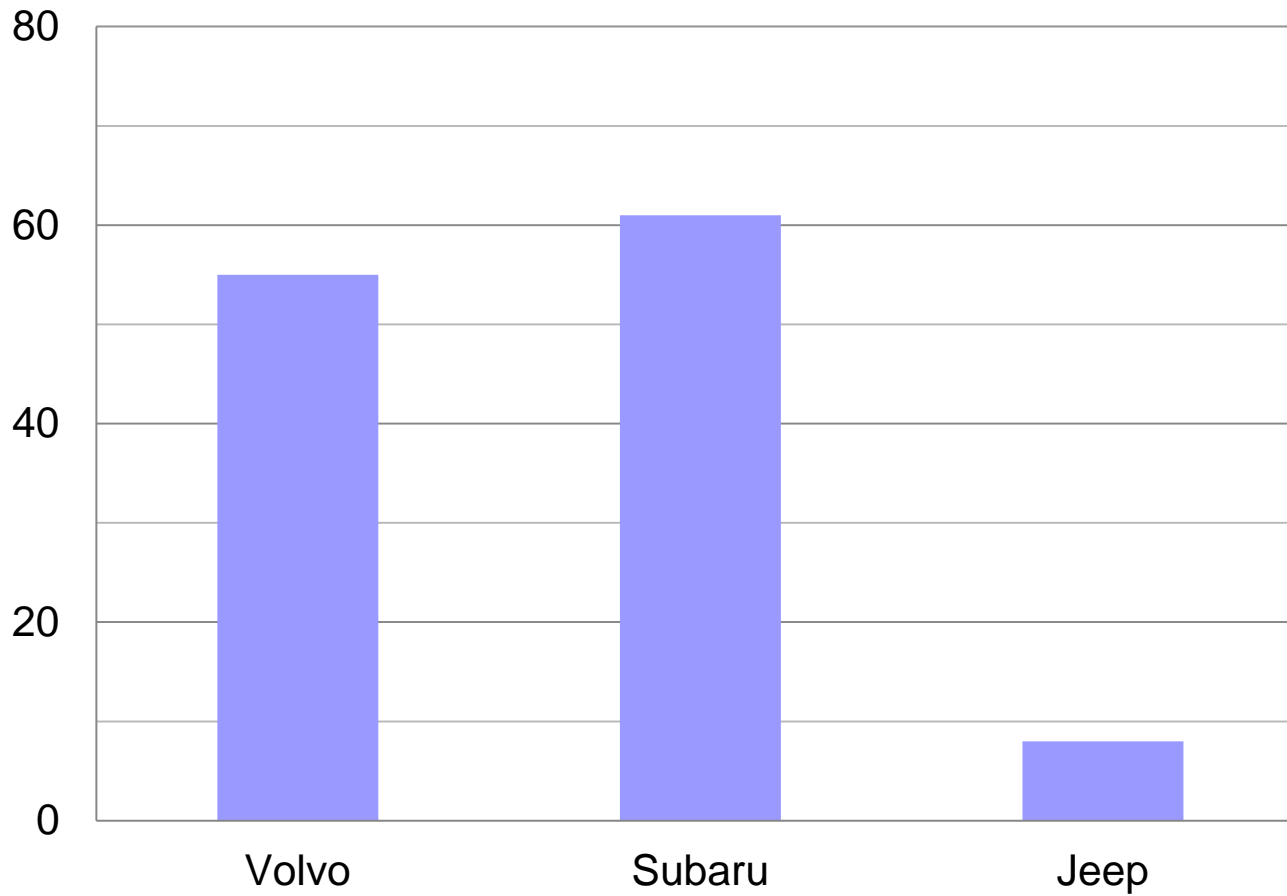
## Percent of dealers reporting





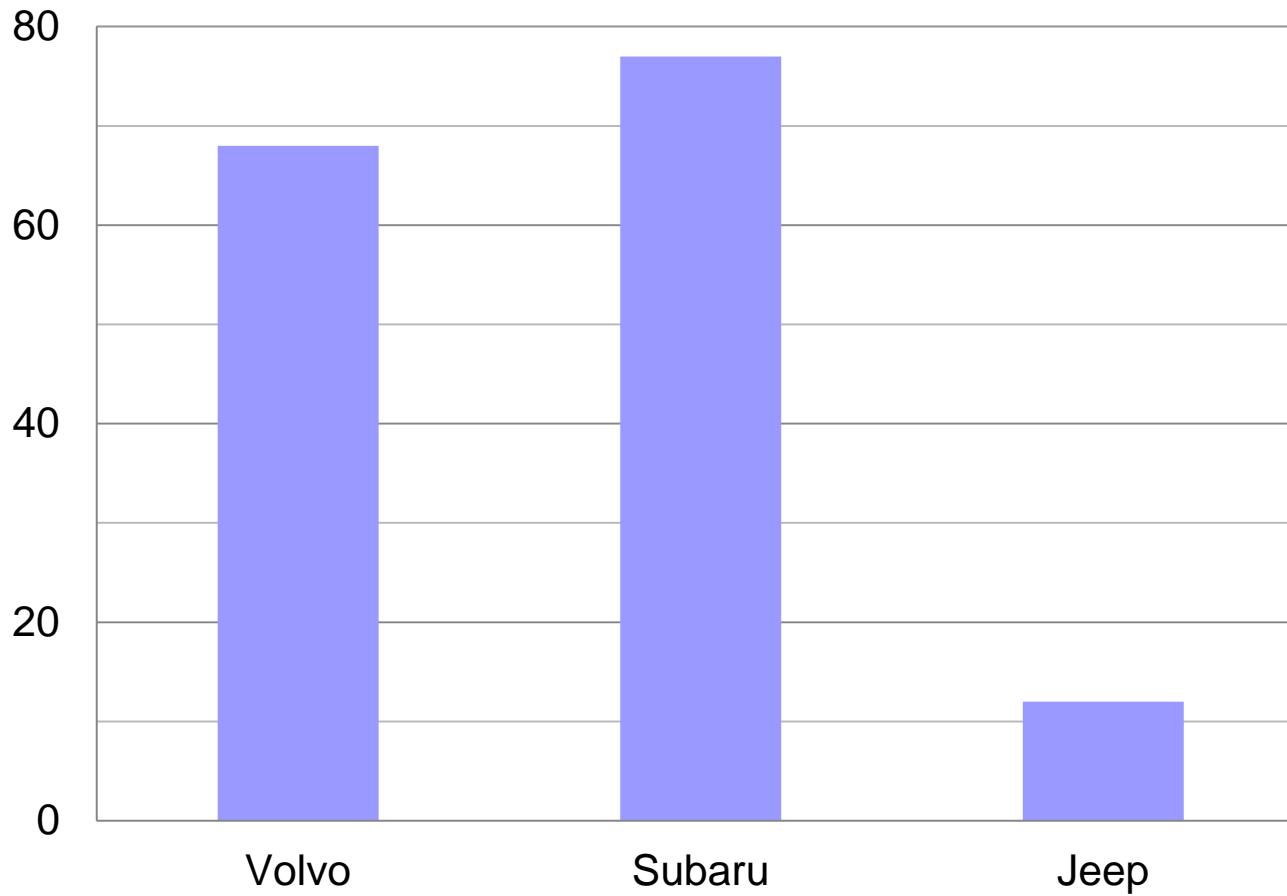
# Increase in customers that mentioned safety performance of brand since announcement

## Percent of dealers reporting



# Customers mentioned performance of brand in recent crash tests since announcement

## Percent of dealers reporting



## Sales of S60 and all Volvo models

Week before and after small overlap crash test announcement,  
158 dealers reporting

	week before announcement August 5-11	week after announcement August 19-25	percent change
S60	267	376	41
all Volvo models	809	956	18

## Sales of Forester and all Subaru models

Week before and after small overlap crash test announcement,  
261 dealers reporting

	week before announcement May 5-11	week after announcement May 19-25	percent change
Forester	1,243	1,422	14
all Subaru models	3,970	4,397	11

## Sales of Patriot and all Jeep models

Week before and after small overlap crash test announcement,  
269 dealers reporting

	week before announcement May 5-11	week after announcement May 19-25	percent change
Patriot	426	419	-2
all Jeep models	2,314	2,325	<1

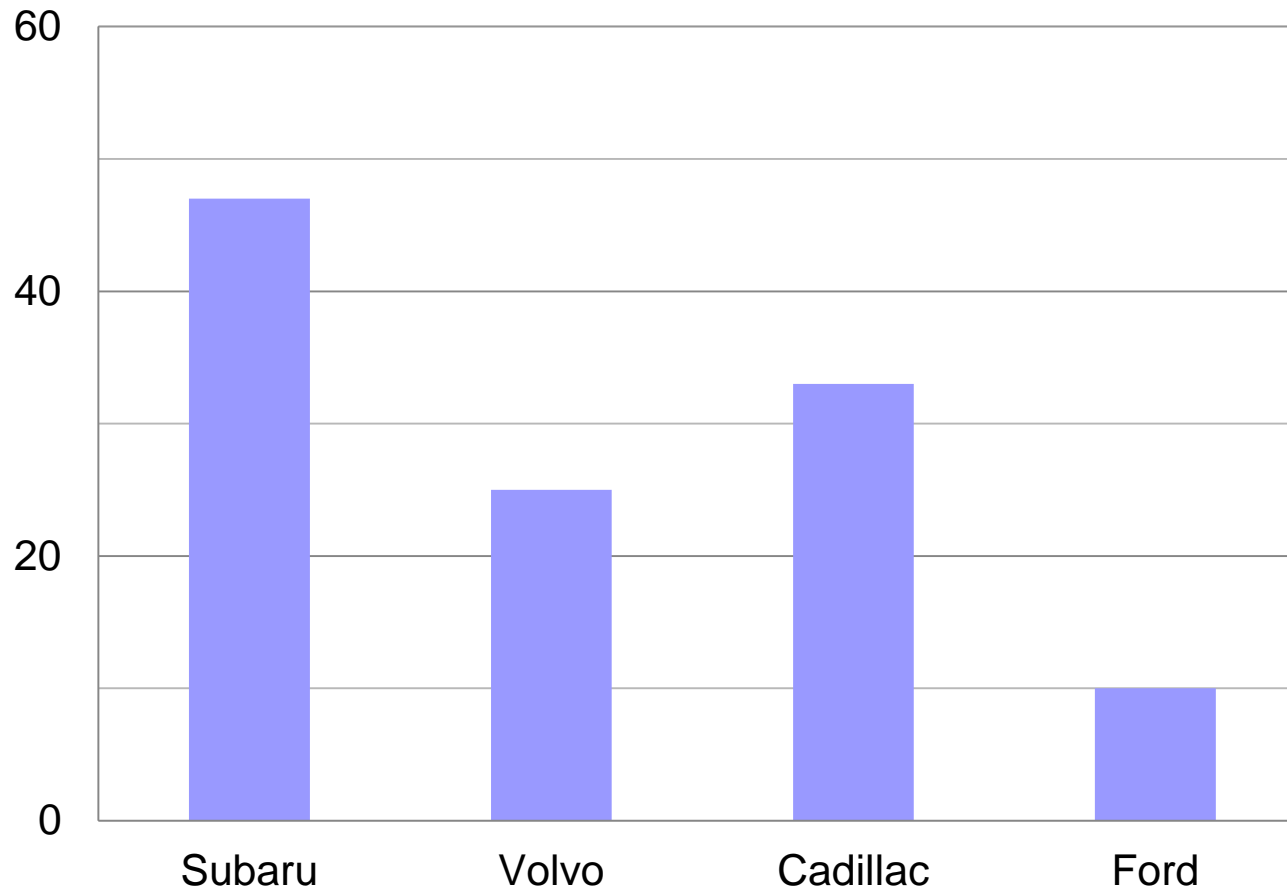
- 14 dealers (5%) reported customers had second thoughts about buying a Jeep since announcement

# Survey of dealerships after inaugural front crash prevention ratings announced

- Ratings announced September 27, 2013
  - Subaru system rated Superior
  - Volvo systems rated Superior and Advanced
  - Cadillac systems rated Superior and Basic
  - Ford system rated Basic
- Interviewed dealers October 30-December 3
  - 275 Subaru, 176 Volvo, 275 Cadillac, and 275 Ford dealers
  - 275 Hyundai dealers interviewed for perspective of automaker without much collision avoidance technology

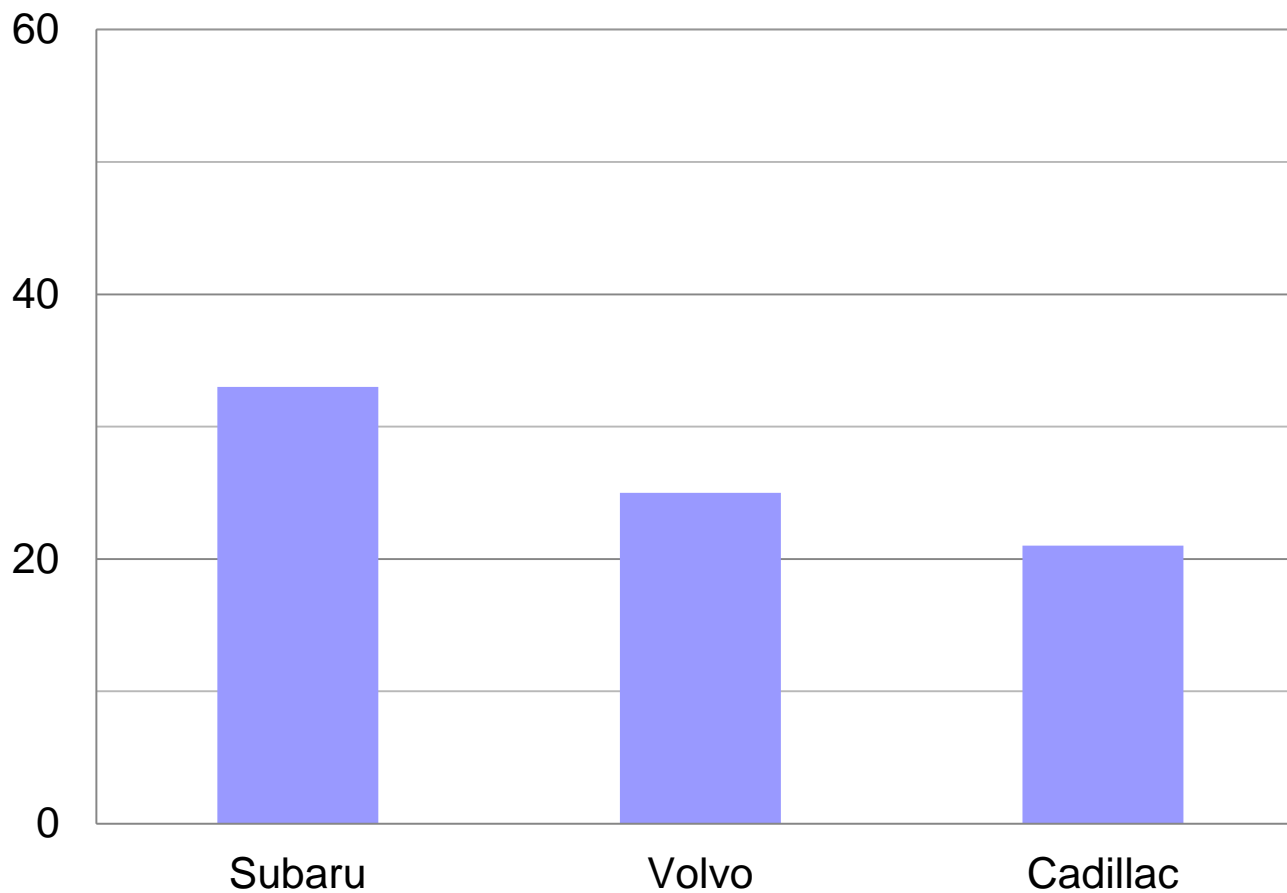
# Increase in customers interested in purchasing vehicle with system since announcement

## Percent of dealers reporting



# Increase in customers that mentioned autonomous braking as reason they considered system since announcement

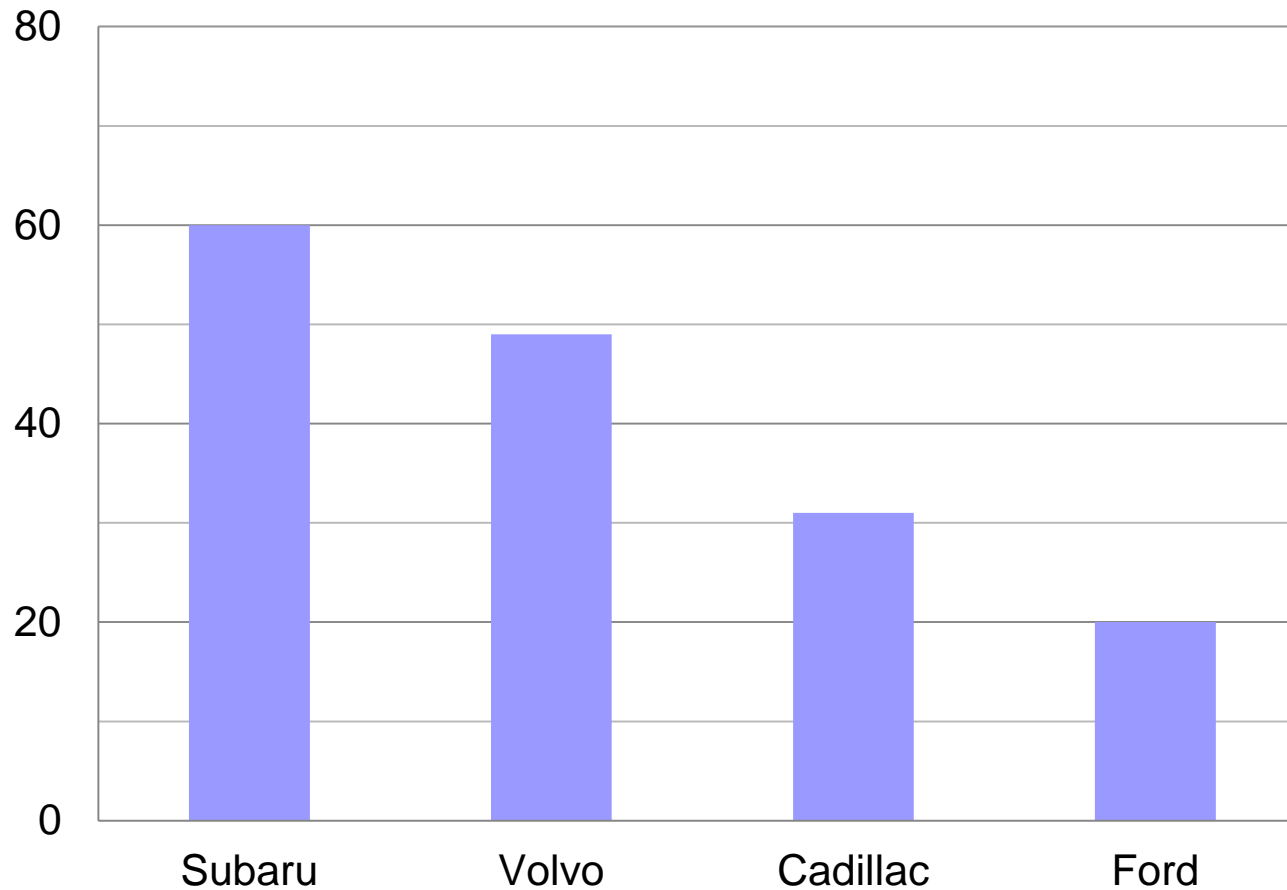
## Percent of dealers reporting





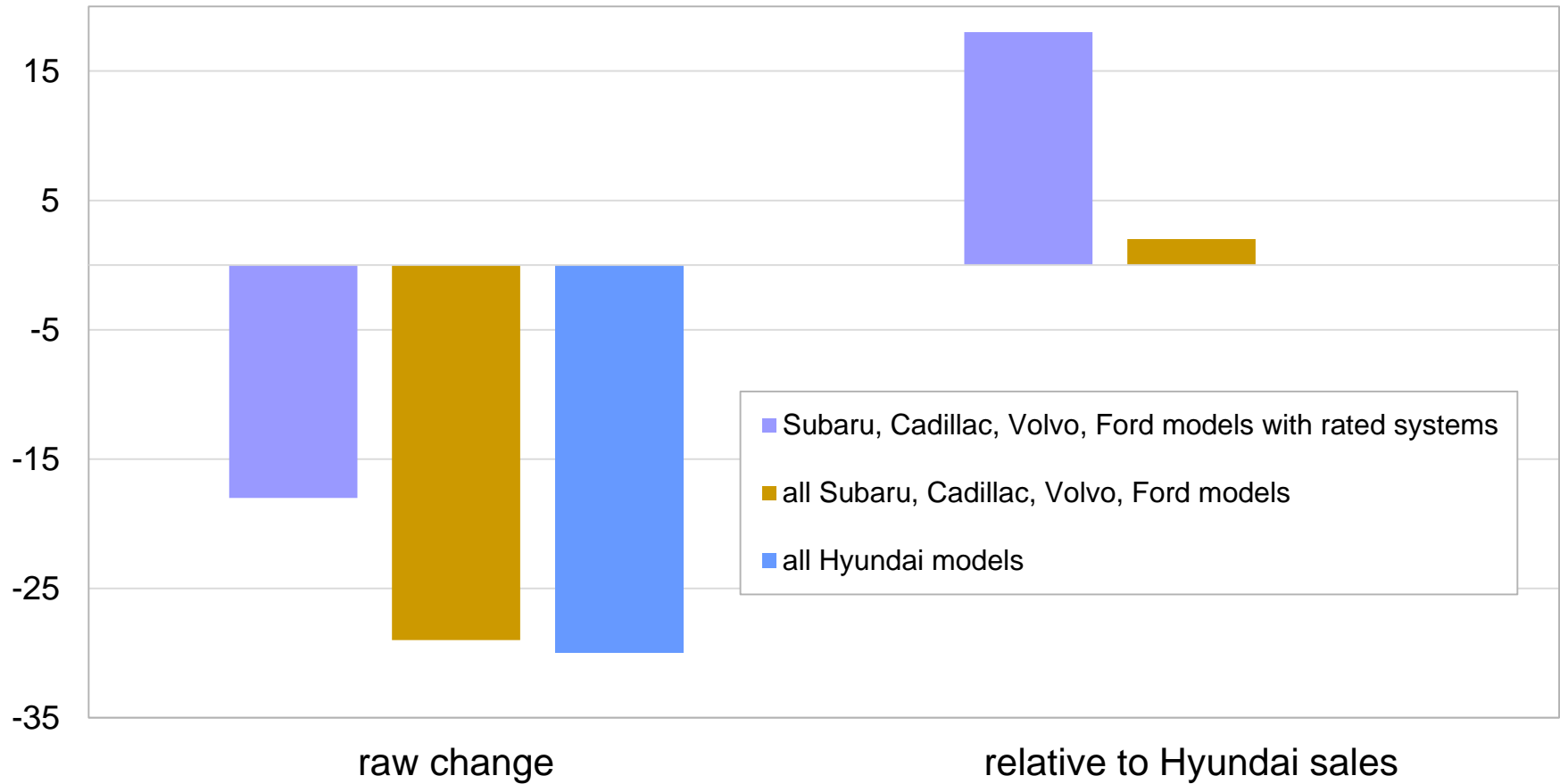
# Customers mentioned seeing system included in safety ratings since announcement

## Percent of dealers reporting



# Sales of vehicles with front crash prevention

## Percent change, week before and after ratings announced



# Conclusions

- Sales increased for Volvo and Subaru models rated Good on small overlap frontal crash test, and stayed the same for Jeep model rated Poor
- Change in interest and sales less positive for vehicles with rated front crash prevention systems after ratings released
  - Perhaps a bad week for sales across the industry
  - Perhaps consumers are familiar with crash test ratings, but less familiar with collision avoidance systems
- Surveys focused on short-term sales
- Suggests that improving vehicle design to increase safety benefits not only consumers, but also automakers

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