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Survey of Volvo Dealers About Effects of Small Overlap Frontal Crash Test Results on Business

2013 Government/Industry Meeting
Washington, DC • January 30, 2013

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Factors in new vehicle purchase decisions

Euro NCAP 2005 telephone survey

- 47 percent looked up information on protection different car makes might provide in a crash
- 34 percent would likely use vehicle safety information from Euro NCAP when choosing next car
- 94 percent said safety was important in deciding which car to buy

Factors in new vehicle purchase decisions

IIHS 2010 U.S. national telephone survey

- Only 30 percent could name an organization that provides new car safety ratings
- But 78 percent had seen safety ratings
 - 67 percent said ratings had been useful to them
- And 86 percent said that safety was very important in a new car

Midsize luxury/near luxury small overlap ratings

	Overall	Structure	Restraints & Kinematics	Dummy Injury Measures			
				Head & neck	Chest	Hip & thigh	Lower leg & foot
Acura TL	G	A	G	G	G	G	G
Volvo S60	G	G	A	G	G	G	G
Infiniti G	A	M	G	G	G	G	G
Acura TSX sedan/Sport Wagon	M	M	M	G	G	G	P
BMW 3 series	M	M	M	G	G	G	P
Lincoln MKZ	M	P	M	G	G	G	A
Volkswagen CC	M	M	P	G	G	A	G
Mercedes C-Class	P	P	M	G	G	G	P
Lexus IS 250/350	P	P	P	G	G	G	P
Audi A4	P	P	P	G	G	P	G
Lexus ES 350	P	P	P	G	G	M	P

good **G** acceptable **A** marginal **M** poor **P**

Television coverage:

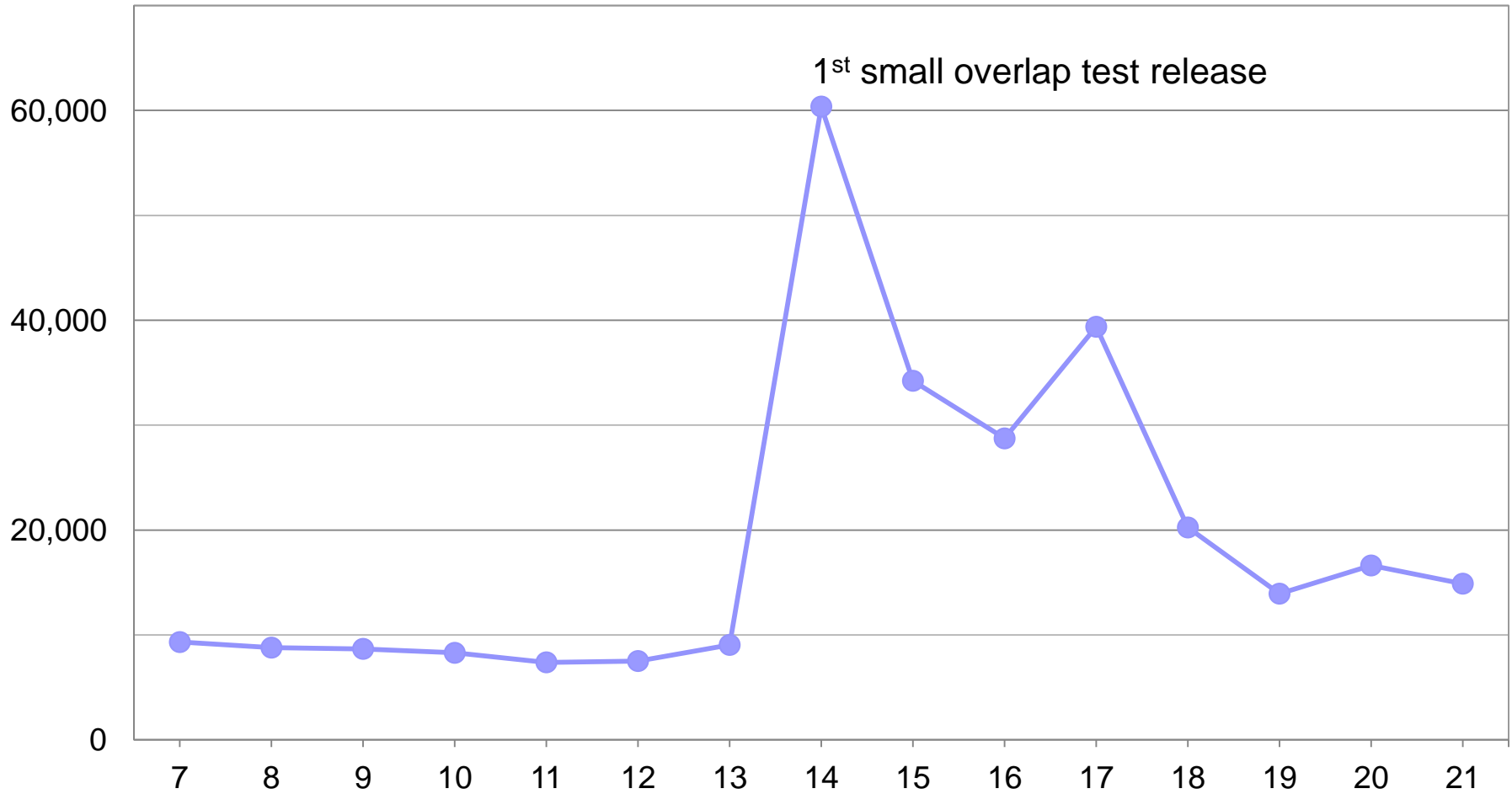
Small overlap crash tests
midsize luxury cars

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

IIHS website visits

August 7-21, 2012



Volvo advertisement



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.

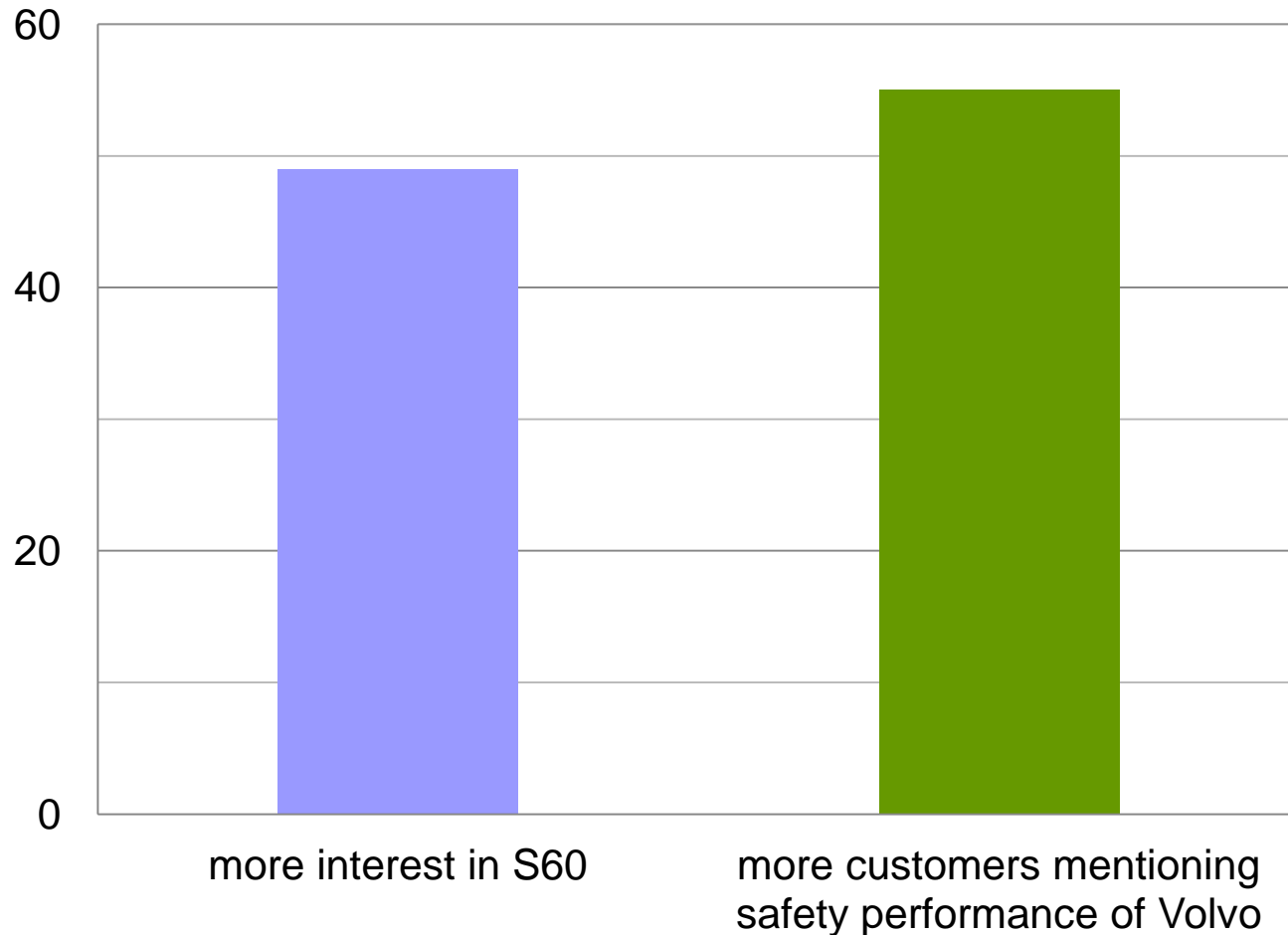
5 YEAR WARRANTY - 5 YEAR SCHEDULED MAINTENANCE
5 YEAR WEAR & TEAR • 5 YEAR ROADSIDE ASSISTANCE

**SAFE + SECURE
COVERAGE PLAN**

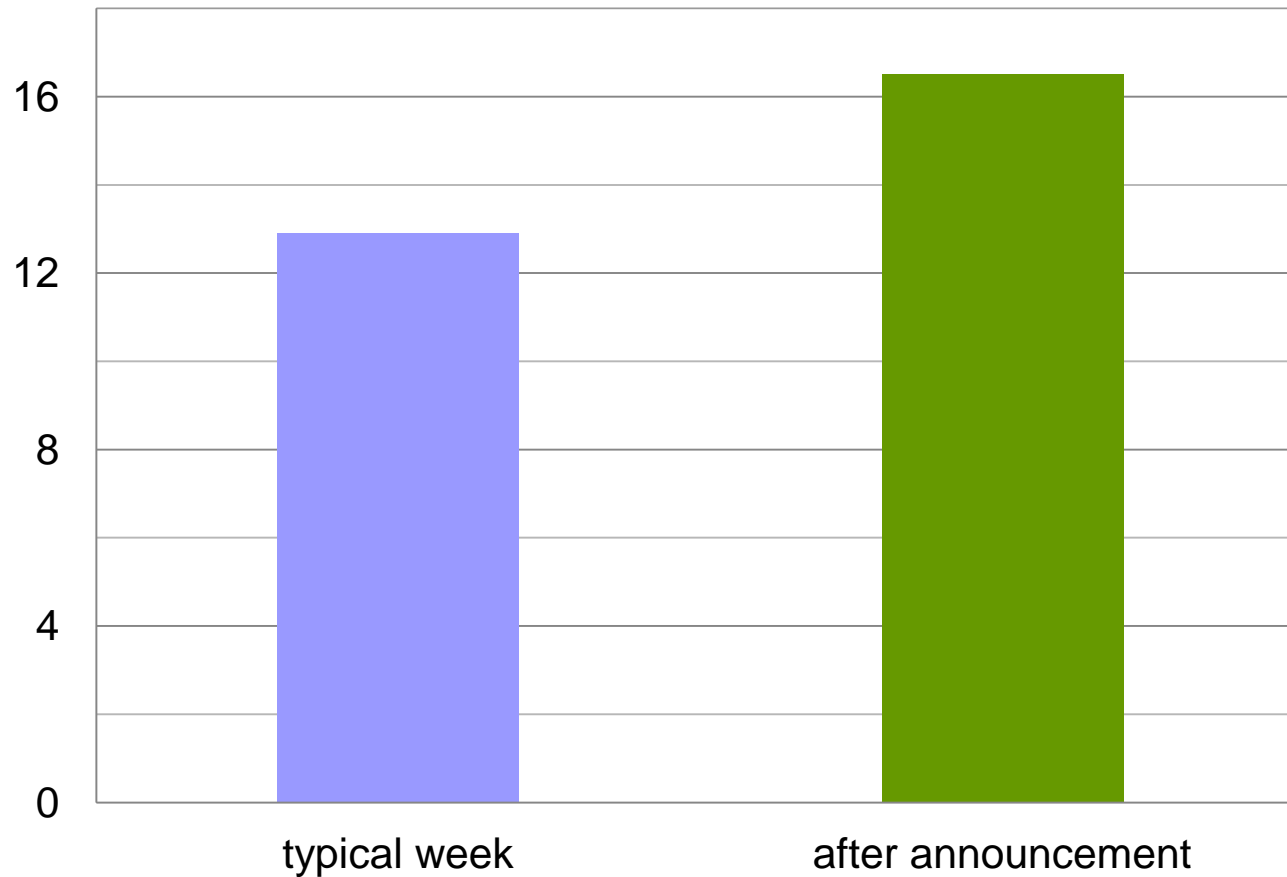
Objective and methods

- To what extent do crash test results translate into consumer interest in top-performing vehicles?
- Surveyed U.S. Volvo dealerships listed on Volvo's website in weeks after August 14, 2012 announcement of small overlap results
 - August 28 – September 6, 2012
 - 206 dealerships responded (66%)
 - Sales manager (67%), general manager (15%), sales representative (15%)

Since announcement of small overlap crash results, percent of Volvo dealers reporting...



Average number of contacts or visits per week by customers considering S60



Proportion of customers mentioning Volvo's performance in recent crash tests

Percent distribution of dealers reporting

three quarters or more	11
between half and three quarters	16
between one quarter and half	23
less than one quarter	18
none	30

Sales of S60s 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 increase
S60	267	376	41
all Volvo models	809	956	18

Conclusions

- Good rating on small overlap test lead to increased consumer interest and sales for Volvo S60 in weeks after results were announced
- More evidence to encourage vehicle manufacturers to improve vehicle design so larger number of models receive a good rating



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