

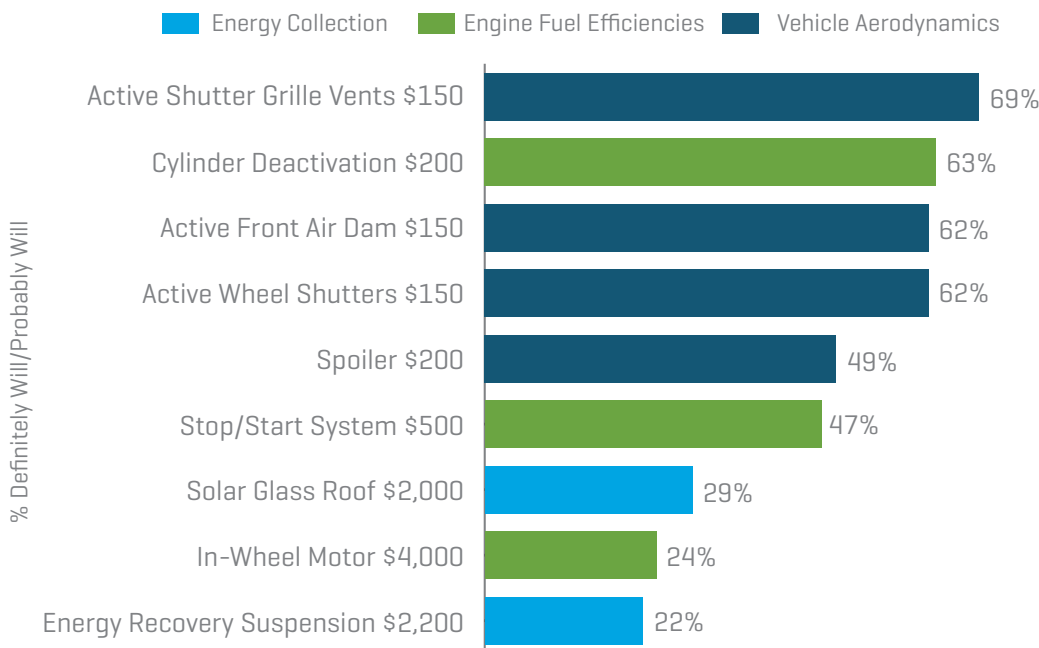


Fuel-Saving Technologies

Will Consumers Pay to Save at the Pump?

Stable gas prices, along with general improvements in fuel economy from today's vehicles, are holding consumers back from making major investments in additional fuel-saving technologies. Consumers view low-price fuel-economy features that provide nominal gas mileage improvements as good enough for now. Lower-cost features that improve fuel economy through vehicle aerodynamics receive higher interest from consumers than more expensive features targeting engine fuel efficiencies and energy collection.

INTEREST IN FUEL EFFICIENCY TECHNOLOGIES



Source: J.D. Power 2014 U.S. Automotive Emerging Technologies StudySM

According to the *J.D. Power 2014 U.S. Emerging Technologies Study*,SM which evaluates vehicle owner interest in 61 vehicle features and technologies, owners express a high level of interest in three of the four features comprising the Vehicle Aerodynamics category, and these three features are included among the top 10 features of interest among owners. Conversely, more expensive fuel-saving features, such as *Solar Glass Roof*, *In-Wheel Motor*, and *Energy Recovery Suspension*, are among the bottom third of interest among vehicle owners, which clearly shows that owners are not willing to make the large investment needed to obtain these technologies.

With the improved mileage ratings on today's vehicles driven by the dramatic rise in federally mandated fuel economy standards, combined with relatively stable gas prices, consumers are not compelled to invest heavily in additional fuel-saving technologies. However, in this post-recession economy, consumers have become keenly aware of their fuel spend; therefore, fuel economy is still very important to them, which is why less expensive fuel-saving technologies have high interest.