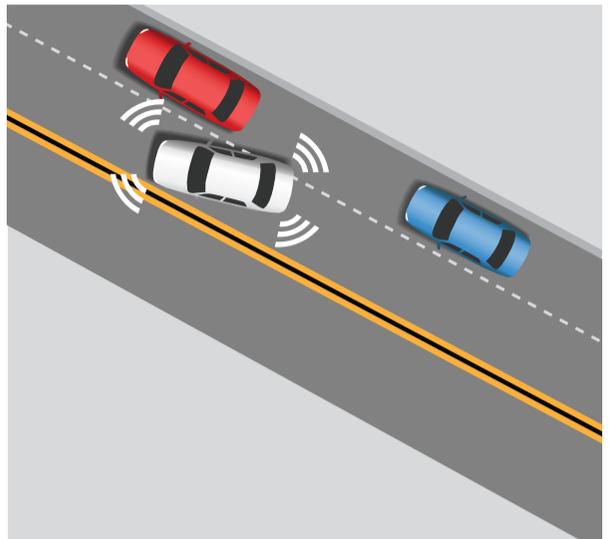


SPOTLIGHT | Autonomous Driving Update

Based on findings from the J.D. Power and Associates 2013 U.S. Automotive Emerging Technologies StudySM

Fully- and semi-autonomous driving is still a relatively new concept. While interest has risen slightly since last year, overall acceptance has room to grow. Drivers interested in fully- or semi-autonomous driving features want to have the latest technology, with the safety benefit being an added bonus. However, consumers still want the responsibility of driving their own vehicle until these technologies fully gain consumer confidence and trust.

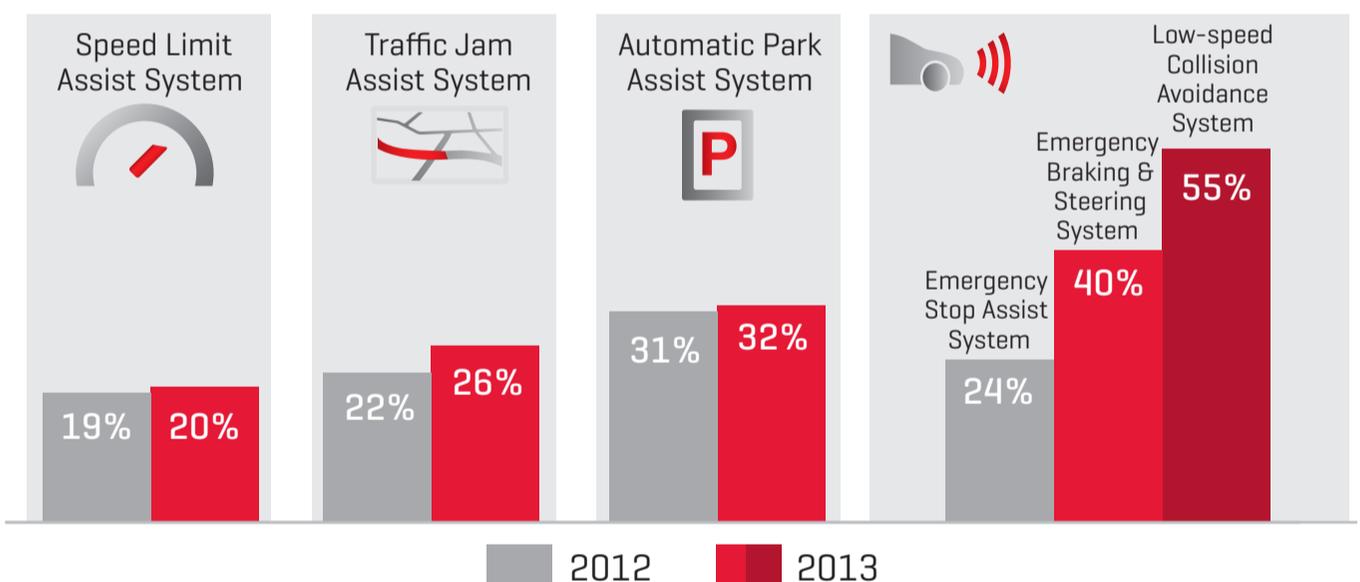


21%

Percent of drivers interested in Autonomous Driving Mode in 2013, vs. 20% in 2012

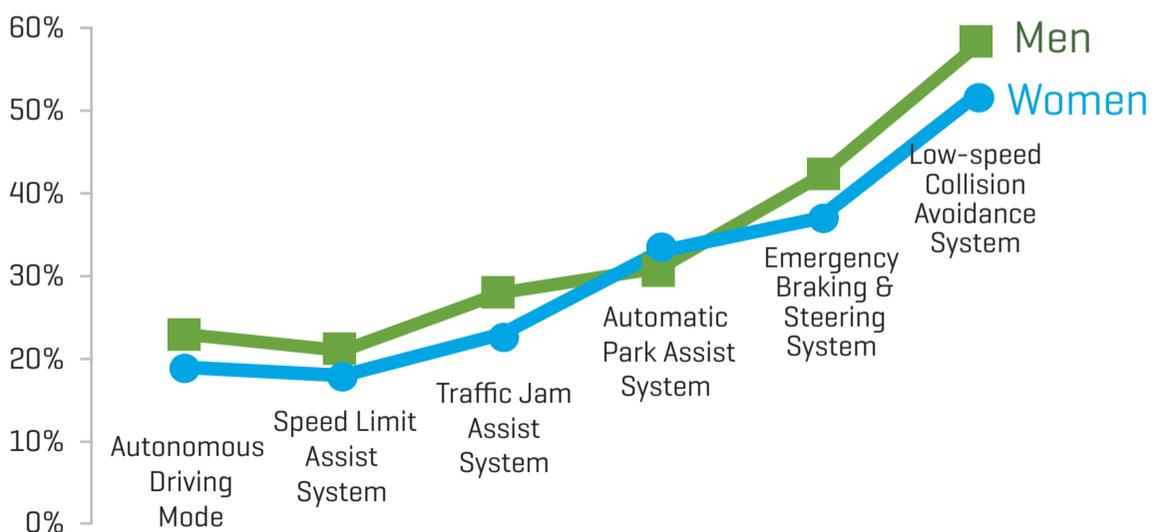
"I don't know if I'm a fan of some of these so called 'self driving' features. I'm afraid it will lead to even more drivers paying less attention to what they are doing."

Interest in Semi-Autonomous Features on the Rise



Interest in Autonomous Features by Gender

"The [car] has park assist which shows the sides and the rear - which is what completely sold my wife since she is not so great at parking in tight parking spots."



Verbatims are from research conducted by J.D. Power's Consumer Insight and Strategy Group