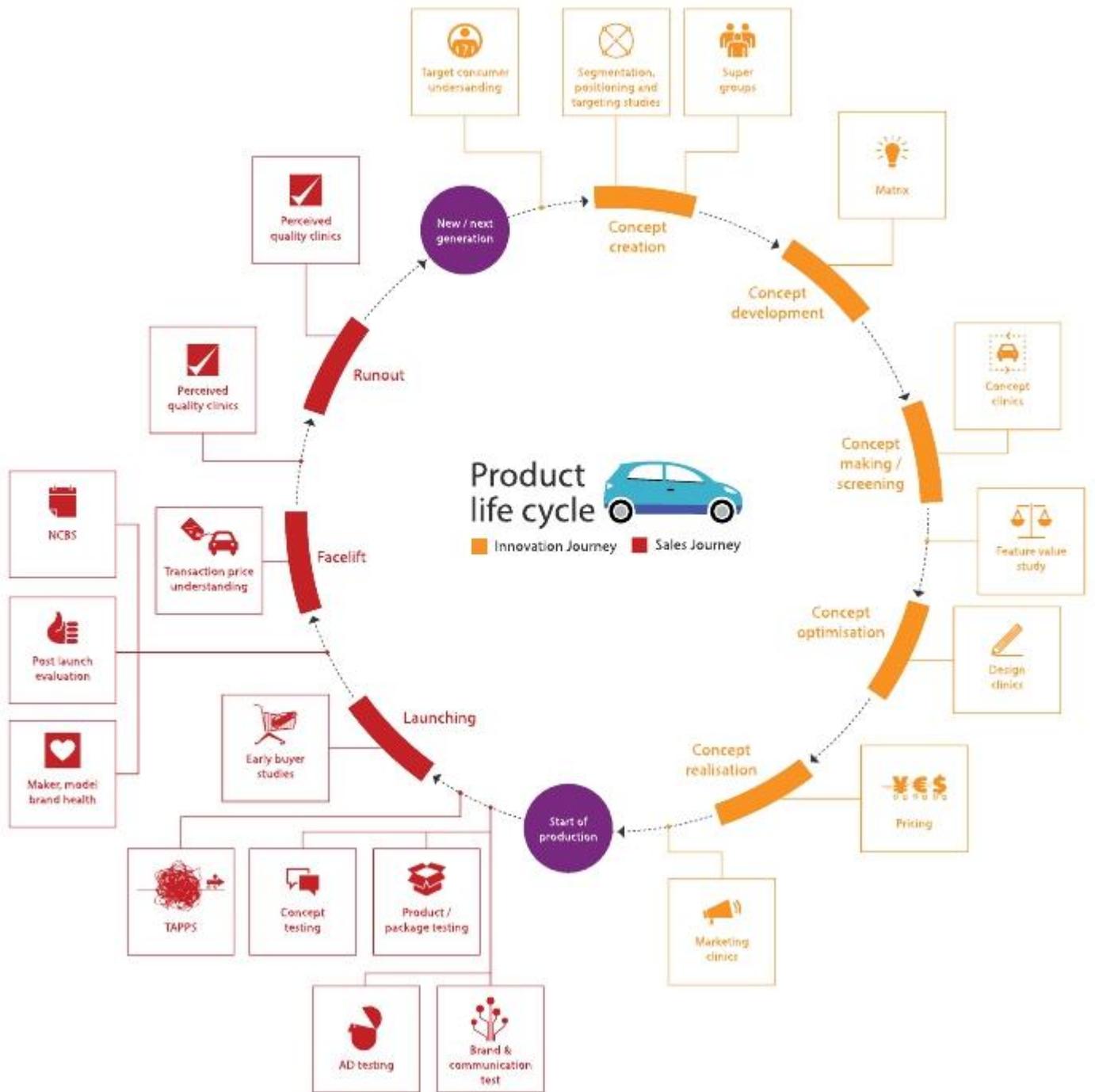
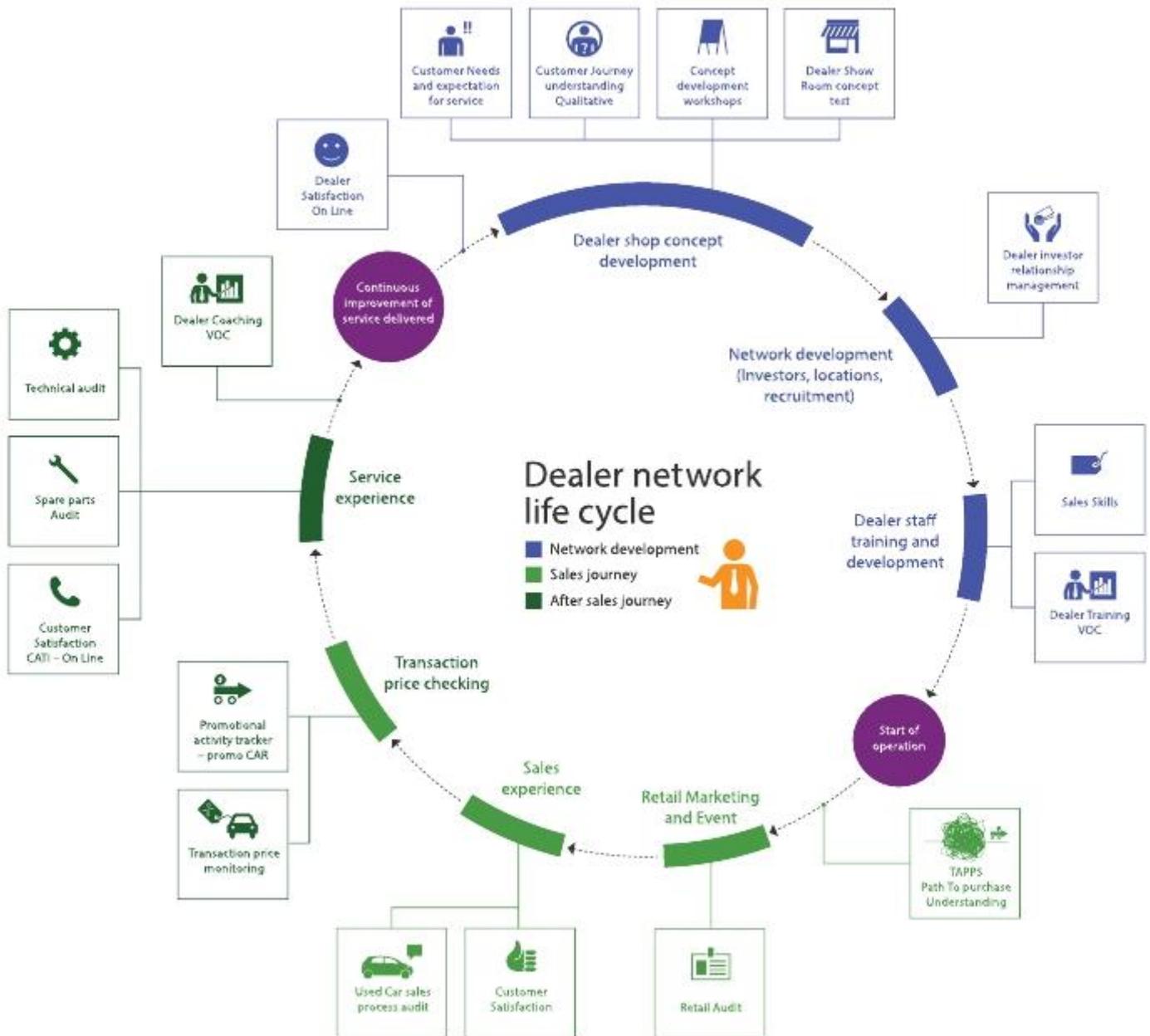


Your guide to profitable growth in China



TNS Sinotrust
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The world's largest and most dynamic auto market demands research solutions that are fine-tuned to its unique, fast-changing environment.

Rapidly changing consumer needs and attitudes in China are increasing the pressure on manufacturers. Success in this expanding market depends upon innovating quickly, bringing products to market at a rapid pace, and controlling costs whilst doing so.

An auto buyer's decision to purchase one of your vehicles is only the start of that consumer's journey with your brand. This journey, and others like it, will ultimately decide what share of the auto market you command and how that share translates into profitable growth. Ensuring customer loyalty to dealer and brand, driving after-sales services and repeat purchases and encouraging customer advocacy all have a vital role to play.

And this is where TNS Sinotrust leads the industry, with pioneering solutions that support automotive manufacturers in driving growth:

- Product development insights to identify breakthrough ideas and secure competitive advantage
- Go-to-market strategies powered by in-depth understanding of your target audiences, price premium and brand positioning
- Network development and management solutions that convert interest to sales and build profitable, long-term loyalty
- Long-term strategic planning to ensure sustained success in an evolving market.



By listening to buyers' and drivers' motivations throughout this complex journey, TNS Sinotrust's auto experts provide the definitive path to better business decisions.

As part of TNS, we are able to leverage four decades of experience interviewing, observing and analysing auto buyers, supported by world-leading research solutions and investment in pioneering methodologies.

This international expertise is underpinned by 20 years of operating as TNS and Sinotrust in China, building specific understanding of the dynamics of this market and successfully supporting the domestic growth of the auto industry.

We'll help you understand differentiating needs and target the most profitable prospects, develop the models your market demands, and build a customer journey that can deliver loyalty and sustainable growth.

Identify the most profitable car buyers to target



China's auto market consists of hundreds of millions of individual car drivers and many more intenders, each with their own differentiating needs and expectations of the driving experience.

To better understand these potential customers, TNS Sinotrust dives deep into Chinese drivers' lives, needs and values.

We listen to them throughout their daily routines: at home, on public transport and inside the cars they drive. We do so

using advanced qualitative techniques, and then apply our unique range of needs-based segmentation tools, to quantify opportunities and identify the most profitable groups of drivers for you to target.

Develop and nurture winning cars and services



Our world-leading Matrix solution provides a proven tool for matching consumer needs to business goals, sizing opportunities and identifying profitable platforms for innovation. Through Super Group, we bring together creative-minded consumers and category experts to turn these innovation platforms into inspiring ideas and early-stage concepts.

TNS Sinotrust will then ensure that your breakthrough ideas fulfill their potential for your business. Our experts will help you to pinpoint the product specification, vehicle shape and price point to take full advantage of your growth opportunity. And with innovations like our fast-turnaround, fully immersive Virtual Car Clinic, you can test more ideas, earlier in the process, before committing to one direction. Our Virtual Car Clinic also provides a cost-effective means of testing and refining ideas “on the fly” in response to early insight.

Once your prototype is ready, we’ll leverage our decades of experience in car clinics to put it in front of precisely the right target consumers, generating an in-depth understanding of strengths and weaknesses, and identifying the features that need changing prior to launch.

Connect to customer value through the right price for your product



A car represents one of the most expensive purchases in any customer's life – and in the fiercely competitive Chinese market, setting the right price for such a high-value item is essential.

It's not always about offering the cheapest price, however. Auto buyers will assess the value of the car in terms of both its functional and emotional benefits – and the winning price is the price that most effectively matches that customer perception of value.

TNS Sinotrusted leverages more than 40 years of pricing research experience to provide you with a uniquely powerful suite of tools to perfect your pricing strategy. We'll identify the value that your brand, model, vehicle components and features represent in the minds of your customers.

We'll help you optimise your vehicle configuration, and we'll help you set a winning price.

Enhance product appeal for launch



Any new model has just one opportunity to deliver a winning first impression.

The launch of a new vehicle is a critical moment that will have a huge say in the success or failure of any manufacturer in the Chinese market. Our marketability clinics will establish the unique selling points, communication platforms and pricing strategy for launching your vehicle – and we will use a range of state-of-the-art research models to execute every aspect of your launch.

The Automotive Path to Purchase Study (TAPPS), exclusive to TNS, measures the actual sequence of events in the car-buying process, and establishes the online and offline

channels that most influence your potential buyers' choices.

We use NeedScope to provide a psychological framework for understanding the complex needs and emotions that shape those choices, perfecting your model and brand positioning in consumers' minds. Ad Eval and Ad Effect, our world-leading advertising pre-testing and media optimisation tools, ensure that your communications engage your chosen audience effectively – and drive behavioural change.

Through PromoCAR, you'll get real-time monitoring of the Chinese auto market's transaction prices, helping to set a launch price that will maximise share without damaging your margins. PromoCAR has been honed over 20 years of operation in European markets and provides a vital competitive asset as the Chinese market matures.

Loyal customers for profitable growth



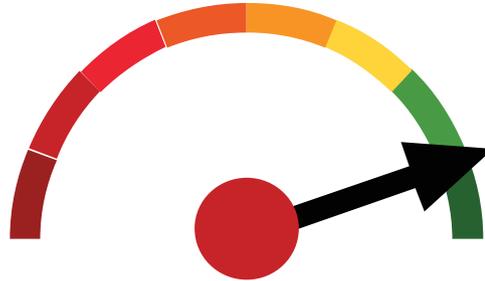
Acquiring new customers is a costly exercise that can reduce dealer margin and weaken the strength of your branded dealer network. To turn a new customer into a profitable one, you need a suite of tools for building and retaining loyalty.

TNS Sinotrust has been supporting manufacturers' sales and aftersales teams in China for more than 20 years and has unrivalled expertise in the field of auto channel management.

We'll give you full control over the experience that your dealerships provide – and we'll guide the improvements that will help you to deliver sustained success.



Turn dealerships into a differentiating asset



Dealerships are the fulcrum in any auto brand's relationship to its car drivers; it's where that relationship can be strengthened and translated into profit – or where it can be critically weakened. Knowledge of the experience that your dealerships deliver is therefore vital for driving sustainable, profitable growth.

TNS Sinotrust was the first research agency to set up a Mystery Shopping service to assess the sales and aftersales experiences that dealerships provide.



Today, we conduct more mystery visits to dealerships than any other research agency, and we are recognised as the leading Mystery Shopper agency in the market. And as China's auto market has evolved, we have developed additional, innovative audit capabilities to assess the key levers determining dealer performance.

For instance, our Mystery Client approach detects any use of non-genuine parts that can seriously damage the end-customer experience, and ensures sustainability and long-term profitability in parts sourcing. Mystery Second Hand Car Shopper provides visibility of the entire process of

second-hand car sales, an increasingly important opportunity for manufacturers as new car sales start to slow and offer reduced profitability.

The certification of dealers and staff offers the best strategy for manufacturers seeking to ensure a constant quality of service whenever drivers deal with their brand. TNS Sinotrust's decades of activity in dealer development and assessment deliver unparalleled expertise when it comes to the certification process. We'll work with you to develop a post grading and rating system for dealer employees, and we'll conduct regular certification campaigns at dealer level to ensure consistency with standard operating procedures.

Driving performance improvements

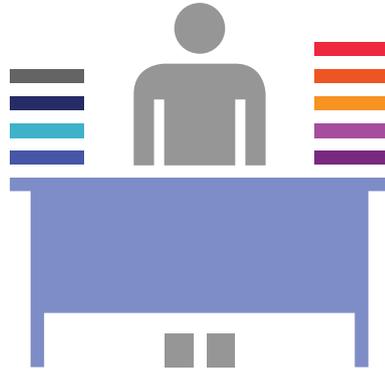


TNS Sinotrust's audit procedures provide a detailed starting point for programmes of improvement that can build competitive advantage.

Our Voice of the Customer and Action Plan workshops involve our experts spending time with dealer staff to debrief their performance, listen to real customer feedback, and work with sales managers on a strategy for improving it. Our technical Mystery Visits bring this improvement process to the maintenance and repair of vehicles.

We train our mystery clients in the proprietary TNS Sinotrust technical centre, equipping them to assess the quality of work undertaken by dealers' technicians. In doing so, we identify areas of excellence as well as areas of necessary improvement – and we provide a critical tool for managing and rewarding employees' performance.

Real-time, actionable customer feedback

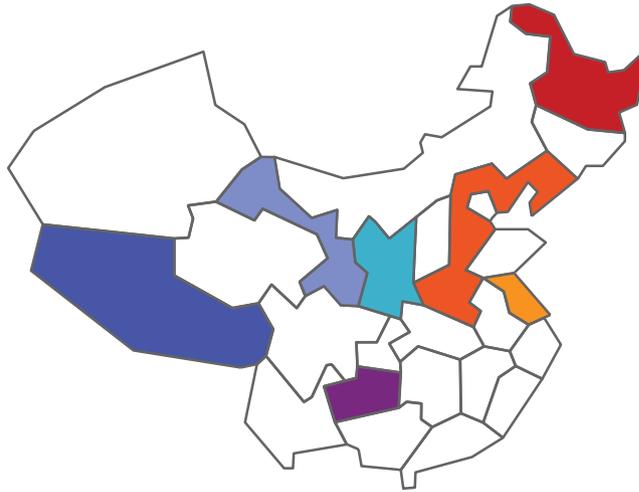


TNS Sinotrust has pioneered innovative approaches to customer experience research that deliver precise customer feedback in a form and timeframe that enable it to make a difference.

This involves the latest in CATI phone interviewing techniques, including advanced quality control through Voice Print Recognition, and leading edge platforms that ensure feedback on customer experience is actionable, and acted upon.

We offer the most complete web-based customer satisfaction platform in existence, powered by leading technologies such as CEMTric, Medallia and Enprecis. Capable of integrating high volumes of data from different sources seamlessly, our live monitoring enables us to detect changes in customer service as they occur and generate alerts and reports to all stakeholders concerned, empowering them to take action.

Growing together in China



The auto market offers manufacturers four paths to growth: you can grow by attracting new customers, by reinforcing the loyalty of existing ones, by launching new vehicles or services and by exploring new markets.

TNS Sinotrust has a team of more than 350 auto category experts, based in China, combined with in-market expertise of more than two decades and a complete portfolio of research solutions. As a result, our agency is uniquely qualified to guide you along each of these four paths.

We can help you in the development of your dealer network, we can guide your innovation process towards the right models and services for China, we can partner with you to

execute effective marketing strategies, and we can equip you with a strategy for sustainable, profitable growth through customer satisfaction and loyalty.

We're connected to a global network of 800 dedicated TNS automotive consultants around the world and part of Kantar and WPP, ensuring we are at the leading edge of developments in data investment management and marketing strategy.

Your journey towards a greater share of the world's most exciting car market means constantly innovating and increasingly improving your service to end customers.



Your success is dependent on accurate, timely insights that enable you to take the right business decisions and stay ahead of your competition.

TNS Sinotrust will capture the pulse of automotive customers and translate that into clear recommendations; applying ground-breaking approaches, so you can make better decisions at every stage of your journey.



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