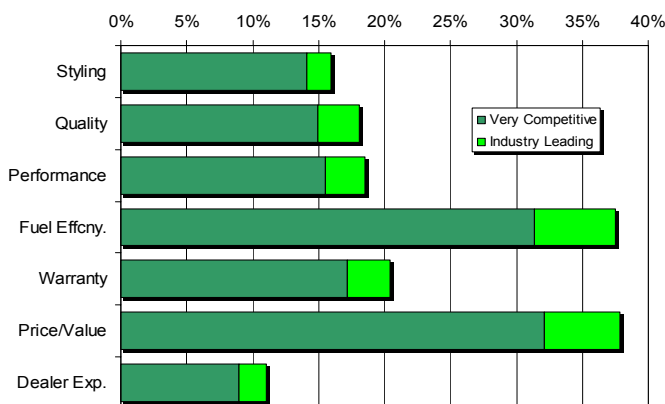


VEHICLES FROM CHINA: EXPECTATIONS & EMPHASIS

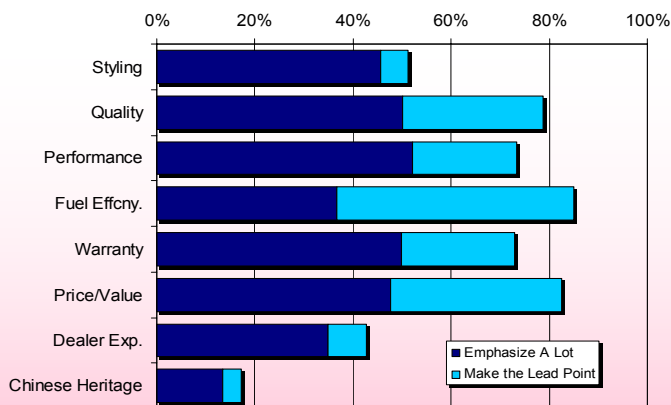
Chinese-made vehicles will be sold in the US sooner than many realize. TNS Automotive asked 2,500 consumers about their expectations of vehicles made in China and what attributes of those vehicles should be emphasized in advertisements to be successful.

Consumers' highest expectations for vehicles made in China relate to **fuel efficiency** and **price/value** (top chart). Over a third of respondents said Chinese vehicles would be at least "very competitive" on both measures. The fuel efficiency expectations could represent a belief that vehicles **made in Asia** are in general more fuel efficient, though that same belief did not carry over to **quality expectations**.

Expectations of Vehicles Made in China



What Consumer Say to Emphasis in Ads



Consumers' advice for advertising content was fairly uniform for five of the eight categories, with the **strongest results for "Fuel Efficiency."** About half of respondents said fuel efficiency should be the lead point (bottom chart). Consumers recommended that advertising **avoid the vehicles' Chinese heritage**. Heritage emphasis had the lowest results and over half said "Do Not Emphasize" (not shown)

Consumers' expectations can be **opportunities and risks**. Opportunities in that consumers already have **some favorable inclinations** of Chinese vehicles on **fuel efficiency and price/value**; risks in that failing to meet these without otherwise compensating could **derail the launch** of Chinese models. The emphasis responses suggest Chinese vehicles sold under non-Chinese brands may be **best poised for success**.