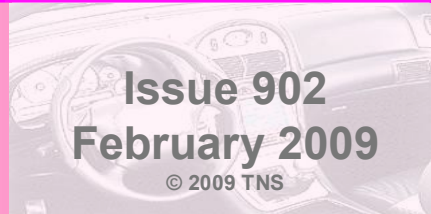




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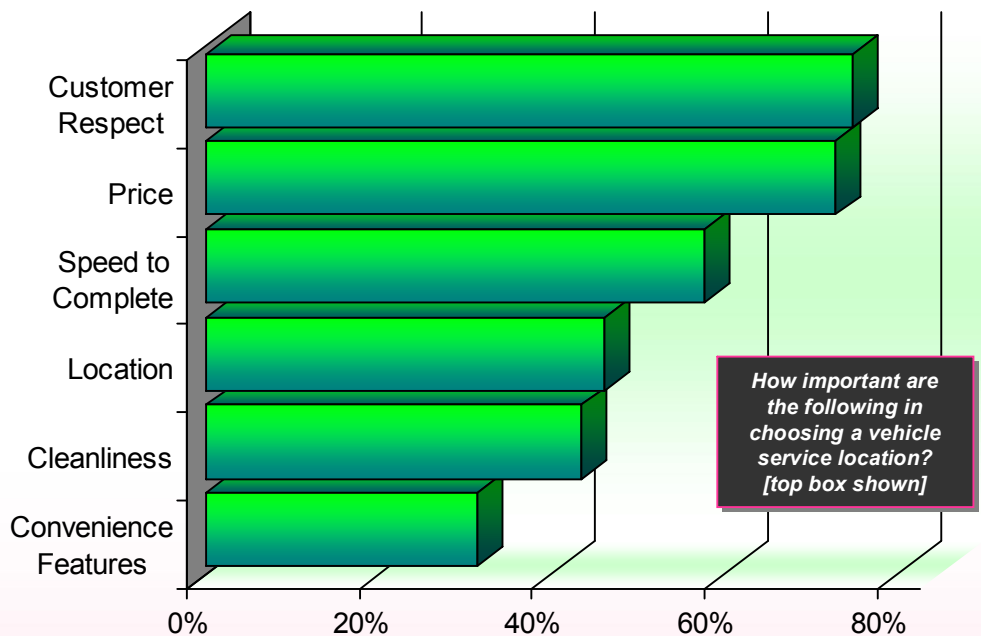
## MOST IMPORTANT SERVICE CHOICE DRIVERS CAN BE MODIFIED QUICKLY



Given the weak economy, many consumers are postponing new vehicle purchases and keeping their current vehicles longer. These consumers represent an **incremental revenue opportunity** for all vehicle service providers. TNS asked 2,500 US adults about the importance of several criteria in choosing a service location.

The good news is that the highest ranking factors can be changed relatively **quickly and inexpensively** compared to the others. Three-quarters of respondents said Customer Respect was extremely important (top box) and 73% scored Price as Extremely Important.

Location, arguably the most expensive to change, ranked lower. That suggests that service entities may be able to use respect and price to **draw customers** from beyond their immediate areas.



Logical next steps include identifying how service consumers **trade-off choices** in the decision-making process. For example, how much further would they travel for a lower price? In addition, Respect, Price and Speed to Complete (time) may together represent core elements of **value**. Understanding and conveying the **right mix of value drivers** and then delivering on them will be crucial to driving incremental revenue.

Note that this research excluded the **importance of brand**. Brands that today represent the right mix of value may be already realizing revenue lifts and are worth emulating. But even those brands may face the challenge of quickly **adopting to the new mix of customers**—a mix that includes traditional customers as well ones that would have traditionally purchased a new car.

TNS is the world's foremost provider of custom research and analysis, combining in-depth industry sector understanding with world-class expertise in the areas of innovation, communication, customer acquisition, and satisfaction & loyalty. For more on these results contact Lincoln Merrihew of TNS Business Solutions (Lincoln.Merrihew@tns-global.com) or Melanie Mumper of TNS Marketing (Melanie.Mumper@tns-global.com)