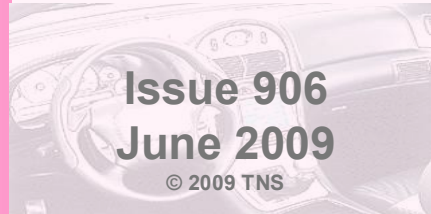




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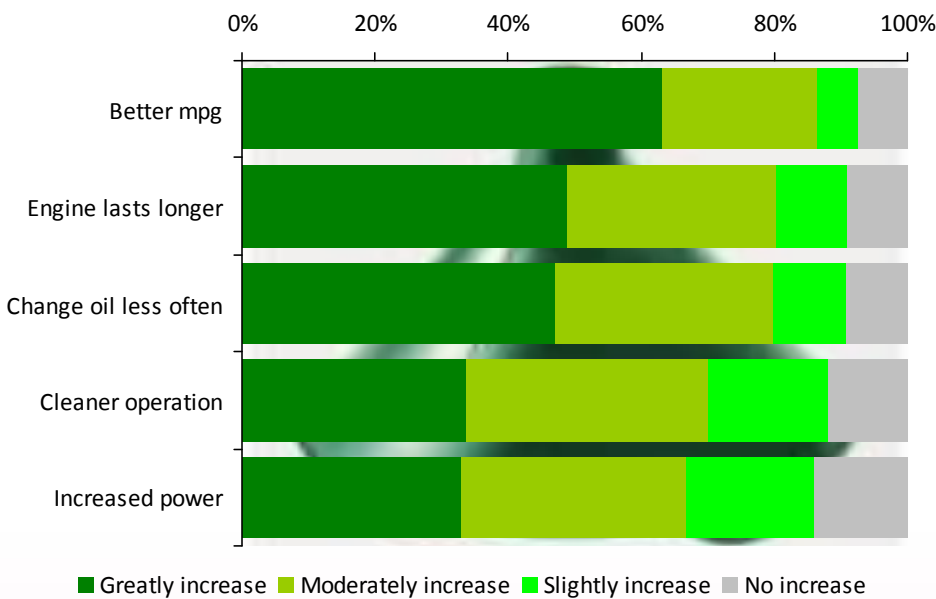
TNS.SENSESM PETROLEUM



Opportunities for New Motor Oil Formulations



The lubricants industry is developing **new standards for motor oils** (called GF-5) designed to help engines last longer and operate cleaner, and improve vehicle fuel economy. Oil companies are likely to launch marketing campaigns in support of their versions of the new oils. TNS asked a nationally-representative sample of 2,500 adults how improvements in performance would increase their **likelihood to purchase** a given oil.



How would the following characteristics of a new motor oil impact your likelihood of trying that oil?

The three leading choices are all related to **lower cost of operation**. Nearly two-thirds of respondents said better mpg would “greatly increase” their likelihood to choose a given oil. Better mpg also means **less total time** spent refueling, as does changing oil less frequently.

Cleaner operation and increased power trailed the set, though still a third of respondents reported these improvements would “greatly increase” their likelihood to purchase.

The results indicate **multiple opportunities** for petroleum companies to promote the features of the new oil standards in their own oils, with the mission of driving sales. The challenge will be in making the message **unique and differentiated** compared to other brands touting their ability to meet the standards, and compatible with the image of the parent brand.

The **state of the economy** may also be relevant. Oils meeting the new standards are not expected to hit the market until Q4 2010. As the economy recovers, consumers increased likelihood related to lower costs of operation **may wane**. Ongoing research should track how the above results change as the launch date approaches. It can also incorporate **willingness to pay**, which we did not investigate here and which is also likely to change as the economy recovers.

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).