AUTO PRODUCT AND MARKETING INNOVATION

CHINA ASSOCIATION OF AUTOMOBILE MANUFACTURES
THE NIELSEN COMPANY

JOINTLY LAUNCH
2014
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MARKET OPPORTUNITIES AND CHALLENGES

MEGA TRENDS ARE RESHAPING THE AUTOMOTIVE MARKET LANDSCAPE

- 中国梦 Chinese Dream
- 城镇化 Urbanization
- 流动性 Mobility
- 大数据 Big Data
- 新技术 New Technology

GROWTH STRATEGY

- 内涵式增长 Profitable Sustainability
- 品类领先 Category Leadership
- 精准营销 Precision Marketing

GROWTH STRATEGY NEEDS TO FOCUS ON GROWTH SEGMENTS

- 51% 再购用户 (Repurchase buyer)
- 68% 低线城市 (Low tier cities)
- 34% 80/90后 (Post 80/90s)
- 45% 女性消费者 (Female)
CONSUMER BEHAVIOR CHANGES OPEN NEW OPPORTUNITIES FOR INNOVATION

YOUNGER USERS

PRODUCT INNOVATION
WHAT NEW PRODUCT CONCEPTS WILL GAIN TRACTION IN THE FUTURE?

DEMAND UPGRADE

TECHNOLOGY INNOVATION
HOW TO BE A LEADING INNOVATOR IN THE FIELD OF TELEMATICS?

CONSPICUOUS CONSUMPTION

MARKETING INNOVATION
HOW TO GRAB SALES OPPORTUNITY GENERATED FROM O2O PLATFORM?

CUSTOMIZATION

BRAND INNOVATION
HOW TO BREAK THROUGH THE PRICE BOTTLENECK AND GROW MY BRAND VALUE?

NEW VALUE PROPOSITION

NIELSEN CONDUCTED NATIONWIDE CONSUMER SURVEY IN APRIL 2014 TO TRACK CONSUMER BEHAVIOR CHANGE

FACE TO FACE INTERVIEWS: 631
City: Beijing/Shanghai/Guangzhou/Chengdu
Beijing: CLT in Auto Show: 300
Shanghai/Guangzhou/Chengdu: 100 per city

ONLINE SURVEY: 500
Target: Key cities of tier 2&3 cities
City: Suzhou, Zhengzhou, Jinan, Mianyang, Kunming+Dongguan
Sample Size: 100 per city : Total number of respondents in Kunming and Dongguan is 100

RESPONDENT CRITERIA:
• Current owner (own one or more cars)
• Potential owner(Potential buyers upcoming year)
• Age: 20-55, Gender Distribution: 7:3
• Decision maker or main user
• For family using or personal using
• Not work in car manufacture or other relevant industries
• Not attended any relevant researches in the past 6 months
THE RESEARCH REFLECTED
THE UNIVERSE OF TOTAL MARKET

<table>
<thead>
<tr>
<th>Item</th>
<th>On-line</th>
<th>Face to face</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Types of Respondents</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Current Car Owners</td>
<td>360</td>
<td>467</td>
<td>827</td>
</tr>
<tr>
<td>Car intenders</td>
<td>140</td>
<td>164</td>
<td>304</td>
</tr>
<tr>
<td>Gender (Soft Quotas, ±5%)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Male - 70%</td>
<td>350</td>
<td>467</td>
<td>817</td>
</tr>
<tr>
<td>Female -30%</td>
<td>150</td>
<td>164</td>
<td>314</td>
</tr>
<tr>
<td>Age (Soft Quotas, ±5%)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1950s' - 5%</td>
<td>10</td>
<td>43</td>
<td>53</td>
</tr>
<tr>
<td>1960s' - 10%</td>
<td>40</td>
<td>74</td>
<td>114</td>
</tr>
<tr>
<td>1970s' - 40%</td>
<td>187</td>
<td>245</td>
<td>422</td>
</tr>
<tr>
<td>1980s' - 35%</td>
<td>203</td>
<td>214</td>
<td>417</td>
</tr>
<tr>
<td>1990s' - 10%</td>
<td>60</td>
<td>55</td>
<td>115</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Item</th>
<th>On-line</th>
<th>Face to face</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Price/Budget (RMB) (Soft Quotas, ±5%)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Less than 80,000</td>
<td>103</td>
<td>49</td>
<td>152</td>
</tr>
<tr>
<td>80,001-120,000</td>
<td>124</td>
<td>64</td>
<td>188</td>
</tr>
<tr>
<td>120,001-180,000</td>
<td>132</td>
<td>136</td>
<td>268</td>
</tr>
<tr>
<td>180,001-300,000</td>
<td>71</td>
<td>139</td>
<td>210</td>
</tr>
<tr>
<td>300,001-500,000</td>
<td>48</td>
<td>134</td>
<td>182</td>
</tr>
<tr>
<td>More than 500,000</td>
<td>22</td>
<td>109</td>
<td>131</td>
</tr>
</tbody>
</table>

TOTAL 1131 SAMPLES
AUTOMOBILE MANUFACTURERS ARE ACTIVELY LAUNCHING NEW VARIANTS BASED OFF EXISTING PLATFORM

PART OF NEW CARS AND CONCEPT CARS OF 2014 BEIJING AUTO SHOW

- **SUV**
  - Sporty
  - Off-road
  - Multi-functional

- **MPV**
  - Large space
  - High versatility
  - For both commercial and family use

- **COUPE**
  - Sports car style
  - Exclusive comfort and space

- **WAGON**
  - Free drive
  - Family care

PRODUCT USP
**SUV MAINTAINS HIGH POPULARITY, WHILE MPV AND COUPE ARE INCREASINGLY CONSIDERED**

**CURRENTLY OWNED BODY TYPE (%)**
- SEDAN: 54%
- HATCHBACK: 21%
- SUV: 20%
- MPV: 2%
- COUPE (TWO/FOUR DOORS): 1%
- OTHERS: 2%

**INTENDED BODY TYPE IN NEXT 12 MONTHS (%)**
- SEDAN: 48%
- HATCHBACK: 17%
- SUV: 51%
- MPV: 6%
- COUPE (TWO/FOUR DOORS): 6%
- OTHERS: 6%

Note: Currently owned body type is based on single choice question, sum of which is 100%; Intended body type is based on multiple choice question, sum of which is over 100%.

**TOP CONSIDERATION FACTORS FOR YOUR NEXT CAR**

**HATCHBACK**
- PRICE
- EXTERIOR DESIGN
- FUEL ECONOMY

**SUV**
- SAFETY
- AFTER-SALES QUALITY
- MAINTENANCE COSTS

**MPV**
- SAFETY
- FEATURE
- SPACE

**COUPE (TWO/FOUR DOORS)**
- COMFORT
- POWER
- SPACE
### The Intended Body Type for the Next Car (%)

<table>
<thead>
<tr>
<th>Body Type</th>
<th>Hatchback</th>
<th>Hatchback</th>
<th>Hatchback</th>
<th>Hatchback</th>
<th>Hatchback</th>
<th>Hatchback</th>
<th>Hatchback</th>
<th>Hatchback</th>
<th>Hatchback</th>
</tr>
</thead>
<tbody>
<tr>
<td>HATCHBACK</td>
<td>21</td>
<td>28</td>
<td>27</td>
<td>12</td>
<td>5</td>
<td>8</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SUV</td>
<td>2</td>
<td>3</td>
<td>14</td>
<td>45</td>
<td>24</td>
<td>11</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MPV</td>
<td>6</td>
<td>5</td>
<td>28</td>
<td>25</td>
<td>24</td>
<td>13</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>COUPE (TWO/FOUR DOORS)</td>
<td>9</td>
<td>7</td>
<td>5</td>
<td>18</td>
<td>35</td>
<td>25</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Budget Level (RMB)

- **Below 80,000**
- **80,000 – 120,000**
- **120,000 – 180,000**
- **180,000 – 300,000**
- **300,000 – 500,000**
- **Above 500,000**

*MID-LOW PRICE HATCHBACK, MID-HIGH MPV AND SUV AND LUXURY COUPE HAVE HIGHER MARKET POTENTIAL*
Derivative variants will meet both first-time and repurchase demand

User source of future derivative models

**Current Cars**

<table>
<thead>
<tr>
<th>Hatchback</th>
<th>Sedan</th>
<th>SUV</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>77%</strong></td>
<td>14%</td>
<td>9%</td>
</tr>
</tbody>
</table>

**Planning Cars**

- **Hatchback**
  - Hatchback priced below **120,000 RMB** will meet functional needs of first-time buyers

- **SUV**
  - Middle to high-end SUV and MPV (180,000 RMB and above) will address the trade up needs of current sedan and small SUV owners

- **MPV**
  - Both SUV and Hatchback will continue the market boom. Followed by MPV and COUPE, those will see more robust growth

- **Coupe (Two/Four Doors)**
  - Premium COUPE priced above 300,000 RMB will address purchasers’ needs for speed and fashion
According to statistics from 2011 China car telematics report, the population of drivers who have in-vehicle internet access exceeded 5 million.

In a study released by Google and Tesla, it is now estimated that by 2015, of the expected 6.6 billion internet terminals around the world, 62 million will come from Connected Cars, making it the third largest terminal for internet connections.

WHETHER TO DESIRE TO HAVE A INTELLIGENT CAR

WHAT IS THE “INTELLIGENT CAR”? The so-called “intelligent cars” refers to a vehicle that is connected to the Internet via internal or external equipment, supports online map navigation, audio downloads, web browsing, and other functions. The Intelligent car might be connected via mobile devices (including the vehicle remote control).
CONSUMERS VIEW TELEMATICS AS A WAY TO CHANGE THEIR LIFESTYLE AND MODE OF TRAVEL

**The Voice of Owner**

“IN MY OPINION, FUTURE CARS WILL BE VERY INTELLIGENT, INCLUDING FACILITATING AN INTERACTION BETWEEN MOBILE AND CAR. I SET UP THE ROUTE AT HOME BY MY PHONE BEFORE DRIVING OUT. WHEN IT IS COLD, I MAY START UP BY MOBILE PHONE TO WARM UP MY CAR. IF THERE IS A MUSIC APP IN THE CAR I CAN DOWNLOAD TO MOBILE FOR SYNCHRONIZATION”

-Mr Liu, 33 years old, Beijing

“TELEMATICS CAN CONNECT TO THE INTERNET, SEE THE ROAD AHEAD OF ME, REROUTE MY ROUTE TO AVOID TRAFFIC JAMS, AND ALSO CAN SEE IF THERE IS ANY PARKING SPACE.”

-Mr Hu, 37 years old, Chengdu

**Convenience**

- Enhance Convenience: 55%
- Must have feature for a car: 46%
- Trend of the future: 42%
- Concerns of privacy disclosure: 18%
- Symbol of following the trend: 17%
- Distracting functions: 13%
- Excessive information than need: 13%
Around 40% of the surveyed respondents have installed telematics in their vehicle, showing strong aspiration among Chinese consumers to own a “Connected Car”.

42% of current owners have equipped with telematics

Frequency of telematics function usage:

- Rear View Camera: 90
- Large Touch Screen: 88
- Online News: 86
- Bluetooth Mobile Phone: 83
- Handwriting Input Function: 78
- Online Map Navigation: 75
- DVD Player: 75
- Online Music: 74
- Blu-ray Players: 74
- Car Phone: 72
- Vehicle Remote Control: 69
- Smart Phone Applications: 69
- Voice Recognition Control: 56
- Digital TV Receiver: 49
- Tracking Stolen Vehicle (GPS): 39
- Time Controlled A/C: 36
- Emergency Assistance: 18
SMART PHONE WILL PLAY A DYNAMIC ROLE IN CONNECTED CARS

ATTITUDE TOWARD SMARTPHONES CONNECTION WITH TELEMATICS

- NEED VERY MUCH: 30%
- NEED: 33%
- GENERAL: 26%
- DO NOT NEED: 4%
- DO NOT REALLY NEED: 7%

DESIRABLE SMART PHONE FUNCTIONALITY

- INCREASED DRIVING SAFETY: 52
- HANDFUL NAVIGATION: 52
- 3G-WIFI HOTSPOT: 38
- VOICE CONTROL: 36
- REMOTE START-UP: 27
- VOICE-ACTIVATED PHONE: 21
- SEARCH ENGINE: 20
- ON-BOARD DIAGNOSTIC: 18

N=604

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CAR MANUFACTURERS NEED TO ACTIVELY DEVELOP TELERMATICS AND USE IT TO GENERATE VALUE FROM REAL-TIME VEHICLE AND CONSUMER DATA COLLECTION

THE FUTURE ECOSYSTEM OF INTELLIGENT CAR AND THE ROLE OF CAR COMPANIES
HIGH ON-LINE CAR PURCHASE INTENTION, THE CONCERNS REMAIN IN OFF-LINE TRIAL AND AFTER-SALES SERVICE

43% USERS CONSIDER TO BUY CAR ONLINE

CONSIDER TO BUY CAR ONLINE 43%

NOT CONSIDER TO BUY ONLINE 57%

REASONS FOR NOT CONSIDERING ONLINE PURCHASE

CAN'T TEST PERSONALLY 79

WORRY ABOUT AFTER-SALES SERVICE 49

PRODUCT QUALITY CAN NOT BE GUARANTEED 48
CONSUMERS TRUST AUTOMOTIVE MANUFACTURERS E-COMMERCE MORE AND ONE-STOP SERVICE

TRUSTWORTHY ONLINE SHOPPING CHANNELS

<table>
<thead>
<tr>
<th>Channel</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>OEM Website</td>
<td>64</td>
</tr>
<tr>
<td>Professional Automotive Sites</td>
<td>45</td>
</tr>
<tr>
<td>Dealer Website</td>
<td>42</td>
</tr>
<tr>
<td>E-Commerce Sites</td>
<td>31</td>
</tr>
</tbody>
</table>

SERVICE EXPECTED FOR ON-LINE TRANSACTION

- 59% ONLINE RETAILERS OFFER ONE-STOP E-COMMERCE SERVICE FOR ONLINE BUYERS’ CAR PURCHASES
- 34% REACH THE INTENTION ONLINE, THEN GO TO THE STORE TO SELECT/PICK UP CAR
- 7% COMPLETING PART OF THE PROCESS ONLINE

ONLINE VEHICLE INFORMATION (PRICE, CONFIGURATION, ETC.)

<table>
<thead>
<tr>
<th>Service</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online showroom (exterior, interior, etc.)</td>
<td>68</td>
</tr>
<tr>
<td>Online reservation of pick-up</td>
<td>50</td>
</tr>
<tr>
<td>Group purchase</td>
<td>43</td>
</tr>
<tr>
<td>Online booking repair / maintenance</td>
<td>40</td>
</tr>
<tr>
<td>Order online</td>
<td>33</td>
</tr>
<tr>
<td>On-line bidding</td>
<td>26</td>
</tr>
</tbody>
</table>

Source: Nielsen analysis, Automotive Consumer Insights Reports
WECHAT HAS BECOME ONE OF THE MOST POPULAR AND TRUSTED INFORMATION CHANNELS

WECHAT IS THE MOST FREQUENTLY USED COMMUNICATION TOOL AND NOW IS BECOMING INCREASINGLY MORE TRUSTWORTHY AS AN INFORMATION CHANNEL.

<table>
<thead>
<tr>
<th>THE MOST TRUSTWORTHY ON-LINE AUTO INFORMATION CHANNELS</th>
<th>MOST FREQUENT USAGE OF MOBILE PHONE</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>N=950</strong></td>
<td><strong>N=950</strong></td>
</tr>
<tr>
<td>AUTOMOBILE BBS</td>
<td>WECHAT</td>
</tr>
<tr>
<td>BRAND’S OFFICIAL MICRO-BLOG</td>
<td>MOBILE PHONE MUSIC</td>
</tr>
<tr>
<td>WECHAT-(STUDENTS/COLEAGUES/ FRIENDS) PRIVATE ACCOUNT</td>
<td>BROWSERS</td>
</tr>
<tr>
<td>PERSONAL VIDEO SITES</td>
<td>MOBILE VIDEO</td>
</tr>
<tr>
<td>WECHAT-THE PUBLIC</td>
<td>GAMES</td>
</tr>
<tr>
<td>OPINION LEADERS OR FRIEND RECOMMENDED</td>
<td>LIFE SERVICE (SUCH AS THE PUBLIC COMMENTE)</td>
</tr>
<tr>
<td>BLOG (SUCH AS SINA BLOG)</td>
<td>MOBILE READING</td>
</tr>
<tr>
<td>SOCIAL NETWORKING SITES (RENNREN,DOUBAN)</td>
<td>SOCIAL NETWORKING SITE</td>
</tr>
<tr>
<td>CELEBRITY MICRO-BLOG</td>
<td>MICRO-BLOG</td>
</tr>
<tr>
<td>MICRO FILMS</td>
<td>ELECTRONIC SHOPPING/PAYMENT</td>
</tr>
<tr>
<td></td>
<td>LOCATION SERVICE</td>
</tr>
<tr>
<td></td>
<td>TOOLS (SUCH AS NOTE, DICTIONARIES, ETC.)</td>
</tr>
<tr>
<td></td>
<td>I DON’T USE ANY APPLICATION ON MOBILE PHONE</td>
</tr>
</tbody>
</table>

Source: Nielsen analysis, Automotive Consumer Insights Reports
FUTURE COLLABORATION MODEL OF MULTIPLE E-COMMERCE STAKEHOLDERS

Car manufacturers should make full use of consumer traffic generated from the third party platform, and provide total service from the dealer e-Commerce platform; Auto OEM website will focus on information supply, customized order, cross region logistics service offering.

FUTURE AUTOMOTIVE E-COMMERCE DEVELOPMENT MODE AND THE POSITIONING OF MANAGEMENT MAIN BODY

Smart phone and Wechat/App

Information inquiry ➔ Models selection ➔ Orders/deposit ➔ Test drive appointment ➔ Negotiation/loan ➔ Payment transaction ➔ Delivery/Pick up

Information/Consumer traffic platform

Auto OEM E-commerce ➔ Complementary win-win ➔ Dealers E-commerce

Customized/full service platform

Automotive Vertical website ➔ Healthy competition ➔ The third party E-commerce
Chinese brand preference is behind Germany and American brand and saw a slight increase over the previous year.

**2013 BRAND PREFERENCE**
Unit: %

- Germany: 68%
- Japan: 13%
- China: 11%
- USA: 6%
- South Korea: 2%
- France: 1%

**2014 BRAND PREFERENCE**
Unit: %

- Germany: 48%
- Japan: 16%
- China: 13%
- USA: 13%
- South Korea: 6%
- France: 4%

Source: Q64a brand preference (first preference)
Base: all respondents
CHINA DOMESTIC BRAND IMAGE IS RELATIVELY AMBIGUOUS, BUT HAS AN OPPORTUNITY TO BECOME MORE YOUNG AND FASHIONABLE

In the eyes of consumers, Chinese brand is far away from the image of an ideal brand, particularly “Decent”, “Fashionable” and “Young”.

IMAGE PERCEPTION OF EACH COUNTRY BRAND

Source: Q66a current image/Q66B ideal image
Base: all respondents
PRODUCT IS THE MOST IMPORTANT DRIVER OF BRAND IMAGE, FOLLOWED BY SERVICE AND MARKETING

PERFORMANCE OF MAJOR BRAND DRIVERS BY COUNTRY BRAND

IMPORTANCE FOR BRAND CONSIDERATION

- Germany Brand
- American Brand
- Japanese Brand
- Korea Brand
- France Brand
- Chinese Brand
CHINESE BRAND PRODUCTS NEED TO CLOSE THE GAP ON QUALITY, REPUTATION, SAFETY AND TECHNOLOGY

Among products drivers, Chinese brands is relatively behind in quality, reputation/grade, safety and advanced technology; Exceptional performance of Chinese brands is seen in ride and handling.

<table>
<thead>
<tr>
<th>BRAND DRIVER PERFORMANCE-PRODUCT</th>
<th>CHINESE BRANDS</th>
<th>LEADING BRANDS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reliable and High Quality</td>
<td>24</td>
<td>54 Germany brand</td>
</tr>
<tr>
<td>Reputation and grade</td>
<td>15</td>
<td>48 France brand</td>
</tr>
<tr>
<td>Safety performance</td>
<td>16</td>
<td>35 Germany brand</td>
</tr>
<tr>
<td>Advanced Technology</td>
<td>19</td>
<td>46 Japanese brand</td>
</tr>
<tr>
<td>Excellent Ride and handling</td>
<td>27</td>
<td>26 Chinese brand</td>
</tr>
</tbody>
</table>
CHINESE BRANDS ALSO NEED IMPROVEMENT IN MARKETING, SERVICE AND USER IMAGE DRIVERS

### BRAND DRIVER - MARKETING COMMUNICATION

<table>
<thead>
<tr>
<th>Chinese Brand</th>
<th>Leading Brand</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enjoys a good reputation in public opinion</td>
<td>29</td>
</tr>
<tr>
<td>Has outstanding advertising</td>
<td>14</td>
</tr>
<tr>
<td>Driving experience activities</td>
<td>30</td>
</tr>
<tr>
<td>New product launch events</td>
<td>19</td>
</tr>
<tr>
<td>Events and activities dealer organized</td>
<td>30</td>
</tr>
</tbody>
</table>

### BRAND DRIVER - DEALER SERVICE

<table>
<thead>
<tr>
<th>Chinese Brand</th>
<th>Leading Brand</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dealer staff is professional and knowledgeable</td>
<td>23</td>
</tr>
<tr>
<td>Good service quality</td>
<td>18</td>
</tr>
<tr>
<td>Car salerooms provide an exclusive ambience</td>
<td>16</td>
</tr>
<tr>
<td>Extensive test drive</td>
<td>25</td>
</tr>
<tr>
<td>Transparent pricing and reasonable charge</td>
<td>42</td>
</tr>
</tbody>
</table>

### BRAND DRIVER PERFORMANCE - USER IMAGE

<table>
<thead>
<tr>
<th>Chinese Brand</th>
<th>Leading Brand</th>
</tr>
</thead>
<tbody>
<tr>
<td>Successful</td>
<td>27</td>
</tr>
<tr>
<td>Tasteful</td>
<td>28</td>
</tr>
<tr>
<td>Progressive</td>
<td>46</td>
</tr>
<tr>
<td>Fashionable</td>
<td>39</td>
</tr>
<tr>
<td>Adventurous</td>
<td>23</td>
</tr>
</tbody>
</table>
CHINESE BRAND INNOVATION NEEDS TO START FROM IMPROVING CONSUMER EXPERIENCE OF EACH TOUCH POINT
Chinese brand faces the dual challenge of low preference and poor brand image. The fundamental solution is to enhance product quality and technology advancement. Meanwhile, it requires sufficient attention to improve consumers' brand experience each consumer touch point from marketing to service.

Multiple emerging auto e-Commerce platforms should seize the market opportunity through merging and cooperation. Car companies are recommended to take advantage of both dealers' and third-party platform to provide integrated online sales service.

Demand for Intelligent cars is on the rise. Actions are being taken by auto manufacturers are speeding up the development of Telematics and its implementation and generating value from dynamic vehicle and user data applications.

Focus on consumers demands in mid-high price of SUV and MPV, mid-low price hatchback and high-end coupe, and make full use of the existing platform to development derivative body type.

**SUMMARY**

**FUTURE IS NOW: HOW TO GRAB WHITESPACE OPPORTUNITIES FROM DEMAND MIGRATION AND UPGRADE**

**1. PRODUCT INNOVATION**

**2. TECHNOLOGY INNOVATION**

**3. MARKETING INNOVATION**

**4. BRAND INNOVATION**
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