The **New Digital Hook** in Automotive

**Ideas and Insights** on how to turn customer satisfaction into brand enthusiasm
The A.T. Kearney Trend Radar

Customer connectivity ("New Digital Hook")

Manufacturing
- Global marketing
- New emerging markets
- Smart data analytics
- Glocal branding
- Dynamic performance evaluation

Wholesale
- Marketing and CRM
- Social listening
- Churn prediction
- Omni-channel experience

Channels
- Fleet services re-engineering
- Innovative urban formats
- Scientific retail

Retail
- Online
- Owned retail
- Franchised retail
  - New cars
  - Used cars
  - Accessories
  - Mobility
  - Finance and insurance
  - Service and repair

- Global marketing
- Dynamic performance evaluation
- Customer connectivity (“New Digital Hook”)
- Manufacturing
- Wholesale
- Retail

Note: CRM is customer relationship management.
Source: A.T. Kearney
“Change is the law of life. And those who look only to the past or present are certain to miss the future.”—John F. Kennedy

This publication is part of our Ideas and Insights series in which we highlight trends and game-changing topics in automotive marketing, sales, and distribution. Our research has identified the fundamental trends that could not only reshape the industry within the next decade but also revolutionize how automotive players gain competitive advantage.

The A.T. Kearney Trend Radar will continue to monitor the major themes driving transformation in automotive marketing, sales, and distribution.
The A.T. Kearney Brand Enthusiasm Index (BEX)

Brand Enthusiasm Index (BEX) = experience intensity per touch point x time spent at touch point

Source: A.T. Kearney
Leverage digital transformation to turn satisfaction into enthusiasm

A brand’s power is fueled by customers’ brand enthusiasm and is a function of the intensity of the brand experience and the time spent at each brand touch point. The A.T. Kearney Brand Enthusiasm Index® (BEX) operationalizes and measures customers’ brand enthusiasm and helps identify shortcomings and opportunities.

While consumers have moved away from traditional automotive channels in favor of digital touch points, manufacturers, wholesalers, and retailers have not kept up, offering a fragmented and incomplete digital brand experience that does not capture the opportunities for digital touch points and erodes customers’ brand experience.

In our discussions with senior industry leaders, we sense a strong appetite to innovate and redesign today’s distribution system. Three actions are the utmost importance:

- Turn customer satisfaction into brand enthusiasm by establishing a mutually beneficial, value-based connection between brand and customer

- Make the customer a brand addict by fully leveraging a connected brand ecosystem

- Cure the current financial underperformance of the distribution system by using digitalization to reduce cost and improve system performance

The New Digital Hook in Automotive reflects on the opportunities to excite customers with today’s technology. We suggest a change in mindset that begins by asking one important question: How can you get your customers to actively seek the opportunity to connect with your brand?
12 Ideas and Insights: How to turn customer satisfaction into brand enthusiasm

What does your future look like?

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<th>Brave new world</th>
<th>Become truly beneficial to your customers</th>
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How will the brave new world materialize?

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Mission impossible?
### How can we learn from others?

**Reality bites**

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<td><strong>Launch</strong></td>
<td>a mutually beneficial collaboration model</td>
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### What do we have to do now?

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The day after tomorrow
Paradigm shift

Clearing the enthusiasm hurdle

Today: **Customer satisfaction**

Tomorrow: **Brand enthusiasm**

Customers’ willingness to connect (brand experience)

Source: A.T. Kearney
Most companies today are constantly trawling for customers. Strategies are defined and measures implemented to catch as many as possible. Commercials, mailings, and social-media campaigns are the big nets in the ocean of customers. Unfortunately, the fishing strategy and gear are outdated for catching a smarter breed of customer.

Today’s customers are well-educated, demanding, experienced with traditional marketing efforts, and more connected and better informed than ever before. They have become the fishermen in pursuit of the best catch. Attracting these customers requires a paradigm shift—from chasing to enticing, from merely satisfying to truly energizing.

By providing superior benefits, products can be transformed into attractive bait that appeals to customers’ willingness to connect. This transformation can help the industry clear the “enthusiasm hurdle,” but it will require a combined approach of OEMs, wholesalers, and retailers covering all channels, utilizing the latest technologies.

In this new world, the rules have changed: Your target intentionally enters your harbor and chases your bait.
Joint forces

Connecting the brand ecosystem

Be connected to your brand whenever and wherever you are

Source: A.T. Kearney
Imagine a genuinely connected brand ecosystem

Our studies reveal a direct correlation between an integrated brand ecosystem and the share of customers connecting to the brand and accepting a digital hook.

It’s true that OEMs and wholesalers have hit many painful snags when trying to improve their network collaboration. But they can build a brighter future on three cornerstones:

**Brand gateway**
- Customers are demanding easy, anywhere, anytime access
- OEMs need to exploit opportunities of connected cars, smart apps, and enhanced websites

**Brand touchpoints**
- Customers want to belong to a brand community where they feel valued
- Loyalty programs combine frequent interactions with customer identification at every touch point

**System linkage**
- A powerful brand experience depends on customers feeling at home everywhere in the network
- All network partners participate fully in incentive and reward systems with a common goal to please customers
System profitability

**Curing the long-term patient**

**Impact projection**

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<tr>
<th>Benefit</th>
<th>OEM</th>
<th>Wholesale</th>
<th>Retail</th>
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<tr>
<td>Revenue increase</td>
<td>+ 6-13%</td>
<td>+ 6-13%</td>
<td>+ 5-10%</td>
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<td>EBIT margin increase</td>
<td>1.2 to 2.7 PP</td>
<td>0.9 to 1.8 PP</td>
<td>0.7 to 1.5 PP</td>
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<tr>
<td>- Increase brand loyalty</td>
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<tr>
<td>- Gain new customers</td>
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<tr>
<td>- Increase new car price</td>
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<tr>
<td>- Increase aftersales loyalty</td>
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<tr>
<td>- Increase marketing efficiency</td>
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<tr>
<td>- Decrease discounts</td>
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Note: EBIT is earnings before interest and taxes. PP is percentage points.
Source: A.T. Kearney
Capture a new distribution performance level

A truly connected offer has benefits for everyone—OEMs, wholesalers, and retailers—and allows the entire system to reach a new profitability equilibrium. Indeed, we project revenue potential of up to 13 percent and profit upside of 2.4 percentage points.

Four factors drive top-line growth:

- More brand loyalty as a result of attractive new services
- Higher conversion rates turning more leads into actual customers
- Increased average new car price as a result of improved up- and cross-selling
- Improved post-sale loyalty driven by active service steering and greater convenience

Two factors improve the bottom line:

- More efficient marketing strategies as enriched customer insights allow for more targeted communication and powerful offerings
- Fewer discounts as a result of superior offerings and better service
Customer pull
Demanding a new connected reality

Impact of digital channels on the customer journey

Examples of digital uplift

Familiarize and choose
- Visible and accessible nationwide demo vehicle pool

Purchase and deliver
- 24/7 product configuration adjustments
- Real-time delivery status update
- Invitation to training based on driving style
- Location-based event invitations
- Remote diagnosis and repair

Use and replace
- Configuration and price agreement
- Follow-up
- Maintenance
- Brand event
- Car breakdown

Experience intensity

Moments of truth

Baseline
Digital uplift potential

Customer life cycle

Source: A.T. Kearney
Recognize how customers force industries to go digital

Today’s customers follow unique paths when making decisions. The increasing fragmentation of customer touch points represents a big challenge for OEMs, wholesalers, and retailers as they struggle to reach customers across all mediums and channels.

At the same time, customers already experience multichannel services supported by digital solutions in other industries—Amazon, Apple, and Nike come to mind. So why shouldn’t drivers expect the same when purchasing and owning a vehicle? Consider the following possibilities:

- A nationwide, transparent, and easily bookable pool of test-drive vehicles meeting all customer configurations
- 24/7 adjustments to new car product configuration after purchase through a secure online channel
- Real-time delivery status updates with pictures of the vehicle as it traverses the production line

Services like these could increase the customer’s emotional involvement—in other words, create digital uplift that helps create a differentiating brand experience across the network with reduced volatility of experience.
Technology enablement
Offering boundless connectivity

Number of connected devices
- Fewer than 500 million
- About 10 billion
- More than 50 billion

World population
- 2000: 6.1 billion
- 2013: 7.1 billion
- 2025: 8 billion

Share of internet users worldwide
- 2000: 6%
- 2013: 39%
- 2025: More than 90%

Mobile money market
- 2013 CAGR through 2018: 82%

Mobile health
- 2013 CAGR through 2018: 31%

Public cloud services
- 2013 CAGR through 2018: 18%

Note: Connected devices include mobile handsets, personal computers, laptops, tablets, vehicles, and household appliances. CAGR (Compound Annual Growth rate)
Sources: Cisco Internet Business Solutions Group, World Bank, the International Telecommunication Union, Gartner, Markets and Markets; A.T. Kearney
Understand that new technologies create connected customers

The technology-digital evolution is continuing to have a significant impact on our personal lives, businesses, industries, and governments. Already there are more connected devices worldwide (10 billion) than people. By 2025, almost everybody will have Internet access.

Mobile offerings are improving, and mobile markets are continuing to grow, often at high-double-digit growth rates. Being connected via smartphone, television, and other devices has become an everyday reality. In this environment, customers will expect their cars to be connected, too.

To some extent, the industry is still working off of a myth that customers will hesitate to connect and reveal their personal information. Yet the usefulness and convenience of new mobile offerings are helping to moderate fears. People are becoming more trusting and comfortable with connecting to a brand and sharing their personal information. However, this trust must be earned with measures that not only deter data abuse but also avoid inconveniences.
System push
*Suffering from poor profitability*

Sources: J.D. Power; A.T. Kearney

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<th>Year</th>
<th>Region</th>
<th>Profitability</th>
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<td>2007</td>
<td>Germany</td>
<td>0.0%</td>
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<tr>
<td>2008</td>
<td>Great Britain</td>
<td>-0.3%</td>
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<tr>
<td>2009</td>
<td>United States</td>
<td>1.5%</td>
</tr>
<tr>
<td>2010</td>
<td>France</td>
<td>1.3%</td>
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<tr>
<td>2011</td>
<td>Italy</td>
<td>-0.6%</td>
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1. **Realize higher average productivity level**
2. **Reduce downside volatility in times of economic downturn**

Time

Retail earnings

- Less than 1%
- Ø
Acknowledge that today’s distribution system is not sustainable

Today’s automotive sales and distribution performance is mostly considered disappointing, unsustainable, and inadequate for the future. As dealers register low to average profitability across markets, they create instability in the network. This means almost all industry players should be open to a redesigned distribution model that unlocks higher margins.

Realizing earnings improvements will be essential to creating a truly connected brand ecosystem. OEMs that spend big on marketing and sales but have limited control of the quality of customer interactions will have much to gain, especially as more direct customer contact means more insights into how and where to improve.

Connectivity will help reduce the impact of, if not solve, such challenges. Yet, while many collaboration efforts have been torpedoed in the past, this next level of integration might actually be embraced due to the financial benefits it brings to all system partners.
Brand gateway
Establishing an inviting entry

Nike
It’s not a shoe. It’s a community.

Developed devoted cult communities and brand followers using social media (including one of the first branded YouTube channels), personalized products and services, and digital customer interaction (NIKEiD, Nike+, and FuelBand).

Burberry
Social transformation of traditional luxury

Established a unique customer connection in luxury fashion with active digital marketing (Burberry World, Art of the Trench social-media website, and active social-media account management), live streaming of fashion shows, and live chats.

Macy’s
Cross-channel integration

Created a seamless, integrated, and highly interactive customer experience throughout the customer journey covering in-store, website, mobile, and app, and combined it with social-media promotions and intelligent customer loyalty programs connecting off- and online worlds.

Automotive industry
A sleeping beauty

A high-technology, highly emotional product capable of connecting users, a high-visibility use case with strong social implications, a national passion for many—and yet no customer-connected brand in sight.

Source: A.T. Kearney
Entice customers into your brand universe

There are numerous innovative approaches to entice customers into a brand relationship. When reaching out to customers using attractive combinations of traditional and digital channels, we recommend adherence to four basic principles used by top companies worldwide:

**Create an exciting entry.** Nike has built a valuable, unique, and exciting entry to attract customers to connect and expand their relationship with the brand. The company uses YouTube to broadcast commercials and has more than 1 million Twitter followers and 12.6 million Facebook likes.

**Keep the conversation going.** Burberry’s digital channel tells stories and ignites conversations about the brand. The luxury fashion brand often tweets images of a new collection before a show, giving Twitter followers a sneak peek before front-row celebrities. And its “Art of the Trench” website showcases both models and customers wearing its iconic trench coats.

**Transform digital leads into sales.** Macy’s builds a customer experience digitally and physically in a push to convert potential customers into actual buyers. The Macy’s mobile app helps shoppers find stores, view specials, and create shopping lists. Once they arrive in the store, the app directs them to where each special is located.

**Be responsive to the voice of the customer.** Each of these brands takes its audience seriously and acts fast on customer responses to exploit positive multiplicator effects and avoid negative spirals.

But what about automotive brands? Cars are ideal products for creating a devoted and connected customer base, and yet most players are not capitalizing on the opportunities. Now is the time to learn from best practices and reel in buyers.
Loyalty programs
Honoring devoted customers

Reward program value

Annual customer spending (in €)

Note: Silver, gold, and platinum refer to loyalty program levels.
Source: A.T. Kearney
Reinvent loyalty rewards

Intelligently rewarding loyalty provides opportunities to interact with customers, tighten bonds with your brands, and sustainably secure and increase a revenue stream. Many industries, including hospitality, fashion, and airlines, have profitable loyalty programs combining monetary and non-monetary benefits in an effort to increase customers’ total spending. The importance of non-monetary benefits rises with every new level a customer reaches. The airline industry provides an excellent example. Non-monetary benefits for high-value customers such as proprietary access to restricted catering lounges, priority parking and fast check-in procedures play a vital role in sustaining and increasing customer loyalty.

The auto industry has largely failed to use loyalty programs to strengthen its customer bonds. Across brands and countries, loyalty rates for new car purchases are around 50 percent, and repeat purchases are not systematically rewarded. In fact, after-sales loyalty is shattered after the first few years, with average loyalty rates as low as 40 percent after four years and 10 percent after eight years.

Two aspects make or break loyalty programs:

- **Significant benefits.** Monetary and non-monetary incentives must be perceived as significant relative to what consumers are spending. Otherwise, programs will fail to be recognized or even backfire

- **Frequency of interaction:** Customers need to feel they are a valued part of the brand community. Achieving this requires intelligently created new touch points.
Network collaboration
Fostering tangible partnerships

Automotive retail system

<table>
<thead>
<tr>
<th>Collaboration element</th>
<th>Industry</th>
<th>Status quo automotive</th>
</tr>
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<tbody>
<tr>
<td>Customer data sharing</td>
<td>Food</td>
<td>Not implemented</td>
</tr>
<tr>
<td>Intra-system reward trading</td>
<td>Airline</td>
<td>Comprehensively implemented</td>
</tr>
<tr>
<td>Status acknowledgement</td>
<td>Hospitality</td>
<td>Not implemented</td>
</tr>
<tr>
<td>Transparent stock availability</td>
<td>Fashion</td>
<td>Not implemented</td>
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</table>

Source: A.T. Kearney
Launch a mutually beneficial collaboration model

Deep collaboration and true partnerships are generally missing in today’s automotive distribution model. In fact, the retail network continues to be characterized by strong intra-brand competition with rivaling partners.

While some in the auto industry struggle to believe cooperating at a higher level is possible, innovative approaches in the food, airline, hospitality, and fashion industries suggest that substantial progress can be made. There are numerous examples of players stepping over stringent industry boundaries to orchestrate an alliance of business partners to cross-fertilize their offerings for the better of the customer and all value-chain partners. Airlines once again serve as a successful example. All system partners cross corporate boundaries to ensure that customers are being served, regardless of the partner in charge.

To build a winning, profitable brand ecosystem, automotive OEMs and wholesalers need to support true network collaboration.
The A.T. Kearney Foresighting Blade

Identifying future scenarios

40-50 Top themes

African lion
Aging consumer
Augmented reality
Civil participation
Connected car
Customization
Dating platforms
Mobile health
Mobile money market
Public cloud services
Sharing economy
3D imaging

Cluster

Hot spot
Trend combinations which have a high likelihood to reinforce each other

Blind spot
Trend combinations which most likely will not influence each other

Source: A.T. Kearney
Understand tomorrow’s customer today

Thinking about the future sounds easy, but it is not always the case. While brainstorming can shed some light on numerous aspects of the future, it can be difficult to find a commonly shared vision.

With this in mind, A.T. Kearney takes a unique approach called strategic foresighting, which is based on the following:

- “Top themes” are derived by creatively considering technologies, applications, and regions not yet in scope. The structured linking and aggregation of top themes results in trends serving as the foundation of alternative future scenarios.

- The foresighting blade structures ideas on promising future trends. It identifies “hot spots” every company should be well prepared for and “blind spots,” which are developments that could have game-changing impact but will only be of relevance for certain regions, technologies, or clusters.

Foresighting has interesting implications for the automotive industry. For example, gauging whether or not older consumers will embrace technology will help gain an understanding of whether they will become comfortable using connected car features. Determining how and why younger people are less concerned about sharing personal information with a trusted brand will offer crucial insights.

Strategic foresighting can help assess the future and offer a head start in a competitive race that is about to start.
## Capability assessment

### Building the required knowledge and skills

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<tr>
<th>Capabilities</th>
<th>Stage 1: Traditional</th>
<th>Stage 2: Emerging</th>
<th>Stage 3: Leading</th>
<th>Stage 4: World-class</th>
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</thead>
<tbody>
<tr>
<td><strong>Customer needs and priorities</strong></td>
<td>- Customer segments are defined and current needs roughly known</td>
<td>- There is a deep understanding of current customer needs and first insights about upcoming changes</td>
<td>- Companies have a clear understanding of changing customer segments and preferences</td>
<td>- There is a clear understanding of current and future customer needs and priorities</td>
</tr>
<tr>
<td><strong>Technology</strong></td>
<td>- Current and selective future automotive technologies are understood</td>
<td>- Current technologies beyond automotive scope are known</td>
<td>- Excellent understanding of current and future technologies</td>
<td>- The technology landscape of the future is actively shaped to better serve customers</td>
</tr>
<tr>
<td><strong>Cross-channel collaboration</strong></td>
<td>- Different channels provide customers with information, but there is no or limited exchange of customer information across chain</td>
<td>- Information across channels is consistent, and digital channels are used to generate leads</td>
<td>- Each channel has targeted content per customer segment, and customer information is shared in real time across the chain</td>
<td>- Insights are captured comprehensively with true interaction with the customer across all channels</td>
</tr>
<tr>
<td><strong>Cooperation</strong></td>
<td>- Dealers rarely use other channels to inform customers</td>
<td>- Dealers actively use other channels to communicate with customers</td>
<td>- Dealers actively use other channels to engage with customers</td>
<td>- Complete sales and service process across and in each channel are possible</td>
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<td></td>
<td>- There is selective cooperation with industry players</td>
<td>- Event-driven cooperation is spurred by cross-industry partners</td>
<td>- Several partners cooperate closely, selectively across the industry</td>
<td>- Extensive cooperation with cross-industry partner network</td>
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Source: A.T. Kearney
Develop the capabilities to serve your customers better

Understanding customers’ current and evolving needs in each target group is a core competence. It includes identifying which needs are most relevant to customers and should therefore be addressed first. This level of customer connectivity is established by embracing state-of-the-art technological solutions and building multi-pronged avenues for communication. Leading companies not only understand these technologies but also actively shape them to meet their own needs.

The use of technologies across channels means more customer insights can be captured and used to develop improved products and services—for example, technologies that allow centralized sharing of customer and product information and advanced analytics to develop more targeted offers.

OEMs, wholesalers, and dealers that join forces can make such connectivity a reality, with additional partners added as necessary to address changing customer needs.
Transformation management

Making change happen

Change elements

Create case for change
Align, engage, and mobilize partners
Establish business processes and technology
Control and sustain change

Classic top-down approach
- Centralize concept development (OEM only)
- Develop top-to-bottom approach and determine impact
- Implement the approach (danger of not reaching client-facing retail staff)

Change from the middle approach
- Involve and empower everyone across the value chain (including management and staff of all partners)
- Increase personal ownership as part of concept development
- Ensure transparency of results
- Enable continuous improvement process

OEM
Wholesaler
Retailer

Source: A.T. Kearney
Get your organization and partners on board

Making change happen is an ambitious process that is best undertaken in four stages.

Understanding the need and creating a persuasive case for change is the first stage of the transformation. All partners within the brand ecosystem have to be convinced of the connected benefits.

Aligning, engaging, and mobilizing all partners is of utmost importance. So following a traditional top-down approach often falls short of creating the necessary buy-in for change. Retail dealers often express concern, especially the fear of losing entrepreneurial freedom.

We therefore suggest a “change from the middle” approach, actively integrating all participating parties (from top management to staff) to increase mental ownership. This is an important prerequisite for the subsequent successful implementation.

Establishing the brand ecosystem requires new processes and technologies to deliver on the promised connectivity offerings.

Finally, a control mechanism is essential to sustain change. Making results transparent is crucial to secure and gain change momentum. It also supports an early identification of weaknesses and paves the way for continuous improvement.
Escape velocity

In physics, escape velocity is the speed at which the kinetic energy plus the gravitational potential energy of an object is zero. It is the speed needed to break free from a gravitational field without further propulsion.

In business, escape velocity is breaking free from competitors with the profound understanding that merely keeping pace with peers will not provide a competitive edge. Today, moving faster than the competition and creating a differentiating customer experience will reel in the full benefits of a digitally enabled, connected brand ecosystem.

Those that pick up enough speed to break free from the gravitational pattern of the average industry evolution will not only improve profitability but also turn customer satisfaction into brand enthusiasm along the way.
A.T. Kearney is a global team of forward-thinking partners that delivers immediate impact and growing advantage for its clients. We are passionate problem solvers who excel in collaborating across borders to co-create and realize elegantly simple, practical, and sustainable results. Since 1926, we have been trusted advisors on the most mission-critical issues to the world’s leading organizations across all major industries and service sectors. A.T. Kearney has 57 offices located in major business centers across 39 countries.

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<td>Manama</td>
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The signature of our namesake and founder, Andrew Thomas Kearney, on the front of this document represents our pledge to live the values he instilled in our firm and uphold his commitment to ensuring ‘essential rightness’ in all that we do.