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Insights

**Data and Intelligence to Make
Better Business Decisions in 2010**



PART OF HACHETTE FILIPACCHI MEDIA U.S.
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2009 Insights

Our Note to You...

In 2009 we launched the Strategic Insights team – focused on bringing more data, insights and intelligence to help you make better decisions about your business. A better understanding of the automotive marketing landscape gives us insights into what works today and where the industry headed. These insights can be found in the form of white papers, case studies, monthly trend reports and blogs.

Over the past year, a few recurring themes have inspired us to explore ways to improve purchase funnel effectiveness, increase message impact and efficiency, and drive greater consideration. The results from these efforts and more are covered in this booklet. We hope you find it insightful and that it helps guide your future digital marketing plans.

Sincerely,
Jumpstart Automotive Group

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Improve Purchase Funnel Effectiveness

Contextual and behavioral targeting in tandem prove more effective in impacting the purchase funnel from awareness to purchase intent

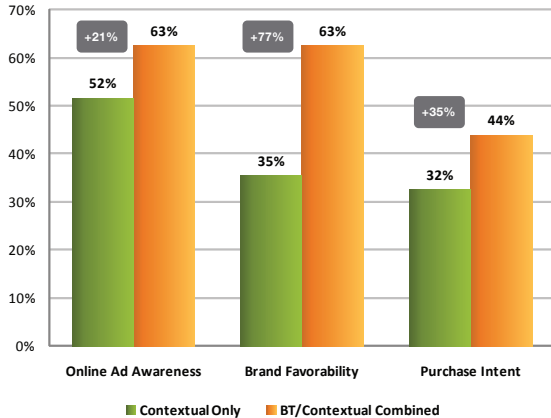
Improve Purchase Funnel Effectiveness

Contextual and behavioral targeting in tandem prove more effective in impacting the purchase funnel from awareness to purchase intent.

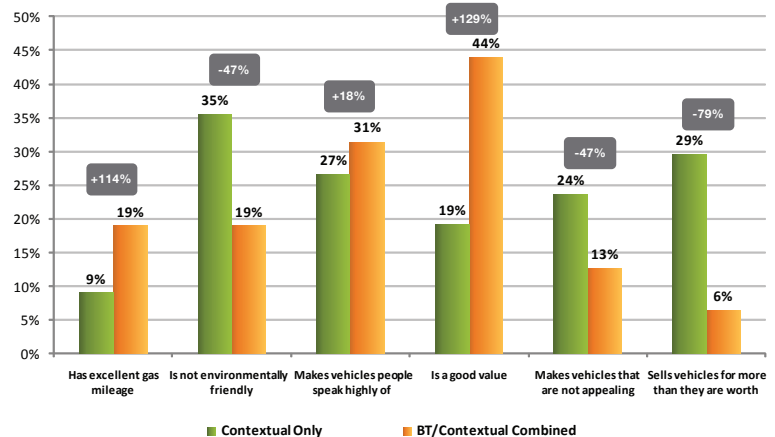
Key Findings

- **70%** increase in awareness, purchase intent and brand favorability for brands who employed the targeting strategies together (see Graph A)
- **130%** lift in positive perceptions for brands in the same sample (see Graph B)
- **17%** increase in share of Jumpstart shoppers and **41%** increase in share of leads submitted on Jumpstart sites for test brands

GRAPH A - BRAND METRIC RESULTS - DOMESTIC - 2008



GRAPH B - BRAND PERCEPTION RESULTS - DOMESTIC - 2008



Study Objective: To demonstrate the positive value of combining behavioral and contextual display media strategies when advertising to in-market shoppers.

Methodology: Surveys deployed July and August, 2008; 1,275 surveys completed among a control group (saw a Contextual ad only) and an exposed group (saw both a Contextual and Behavioral Targeting ad). Results from both samples were compared to gauge lift in awareness, consideration and intent; Shopping and leads on publisher sites were also analyzed for quantitative results.

White Paper: April 2009

Improve Purchase Funnel Effectiveness

Contextual and behavioral targeting in tandem prove more effective in impacting the purchase funnel from awareness to purchase intent.

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Executive Summary & Background

Behavioral Targeting (BT) grew in popularity about halfway into this decade as an opportunity to fully capitalize on highly valuable, yet finite audiences online. Prior to the creation of third-party automotive research websites in the late '90s, the only true in-market consumer that existed was in a dealer's showroom.

Fast-forward about 10 years, and the number of dealer showroom visits has diminished considerably – from about six visits per consumer vehicle purchase 10 years ago, to less than two now, according to some dealer sources. Meanwhile, the percentage of people shopping online for a car has reached a critical mass – 80% according to a 2007 CapGemini study¹. Third-party automotive research sites have become a consumer's staple in the process of purchasing a car. Some of the facts and figures:

- The internet – specifically auto research sites - influences 77% of consumers' make/model selections.²
- In-market consumers indicate that third-party research sites are the most useful sources of auto shopping information, even more so than manufacturer and dealer sites.²
- New vehicle buyers also indicate that third-party sites are the first type of automotive site they visit.²
- The Internet is the number one media source driving dealer walk-in traffic – more than half of all walk-in traffic generated by advertising can be attributed to the internet³.

And since only 58% of U.S. consumers indicate that they'd buy a vehicle from the same make as their current vehicle (down from 62% and 59% in prior years)¹, it demonstrates implicitly that most online shoppers are undecided on the make or model of their intended purchase. Behind these facts, the internet presents an optimal opportunity to drive consideration.

Behavioral Targeting: Past and Present

Since the inception of behavioral targeting, the online ad industry has consistently rendered it as its own discipline within the online medium. Agencies plan and buy BT as a separate bucket, treating it as a singular strategy with varied objectives. Research outlets project BT revenues independent of overall display advertising – and those projections are generally very favorable. The adoption of BT as a marketing strategy is clearly on the rise.

Studies have proven its effectiveness as a targeting strategy. At Jumpstart we've seen BT drive higher consideration, awareness, purchase intent, and low-funnel performance indicators when studying a variety of brand campaigns.

Marketers have grown more and more confident in utilizing BT in a majority of their media plans. Three-quarters of advertisers indicated they were willing to pay more for behavioral targeting opportunities, particularly for in-market consumers⁴, and more and more marketers are utilizing it in the majority of their online media campaigns.

For media companies that deliver a valuable BT product with originating behavior that is representative of a true in-market automotive audience, the opportunity to capitalize on the finite nature of near-term shoppers is a sizeable one – like fishing from a barrel instead of an ocean. Since only about 22% of new vehicle buyers actually submit a request for a quote online, the majority of in-market shoppers leave the door open to have their decision influenced by smart marketing and targeting.

The Optimal Targeting Tandem

This is where contextual *and* behavioral targeting as a cohesive strategy takes shape. To maximize the full potential of your automotive in-market targeting – reach, frequency of message, impact of message, and results – the optimal approach is to find the right audience and target that audience through contextual and behavioral means. Place value on the consumer’s past and present behavior indicators, rather than *where* you’re marketing to that person.

At Jumpstart we’ve had over three years of experience delivering successful BT campaigns for our customers, and eight years of providing relevant contextual third-party automotive site targeting opportunities.

Background

We recently commissioned a study in conjunction with AudienceScience on the advantages of reaching a highly qualified in-market audience through behavioral and contextual targeting as a collective strategy. Jumpstart and AudienceScience worked with Insight Express to develop the study, which took place in July and August of 2008 and included campaigns from a domestic and an import auto manufacturer. It combined survey data (via Insight Express), and Jumpstart’s behavior-based data as collected through the AudienceScience system and analyzed by the Jumpstart Strategic Insights group. Both brands utilized standard IAB ad sizes (300x250, 160x600, 728x90).

The Problem: Online media planners and buyers typically bucket behavioral and contextual targeting into separate budgets, and evaluate their success metrics separately. The potential disadvantage to this approach for marketers and agencies is that the right audience – both the quality of publishers and depth of targeting – can be fully leveraged by utilizing both targeting mechanisms in tandem.

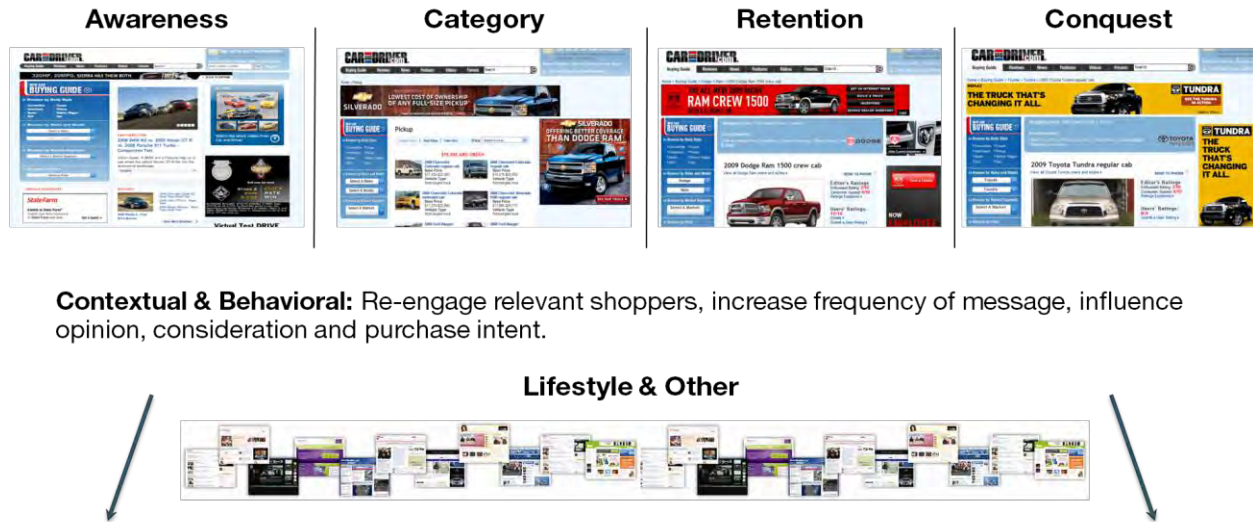
Study Objective: To demonstrate the positive value of combining behavioral and contextual targeted display media strategies when advertising to in-market auto shoppers.

Contextual in-market media targeting typically flows as follows:

- Awareness (home page, high impact)
- Category (Vehicle segment level, i.e. Luxury SUV)
- Retention (OEM’s own make/model page targeting)
- Conquest (Competing brands’ make/model page targeting)

Adding BT to contextual targeting augments the frequency of the marketer’s message to the highly coveted audience identified on third-party sites (see Table 1.1). The benefits of this evolution from page-focused to page- and audience-focused targeting are demonstrated in the results of this study.

Table 1.1 Blending Contextual and Behavioral Targeting to maximize impact of in-market



Contextual & Behavioral: Re-engage relevant shoppers, increase frequency of message, influence opinion, consideration and purchase intent.

The Results

The study concludes that contextual targeting alone demonstrates a high level of impact in awareness, consideration and purchase intent. But when employed in tandem with BT, the impact on those key factors is significantly greater.

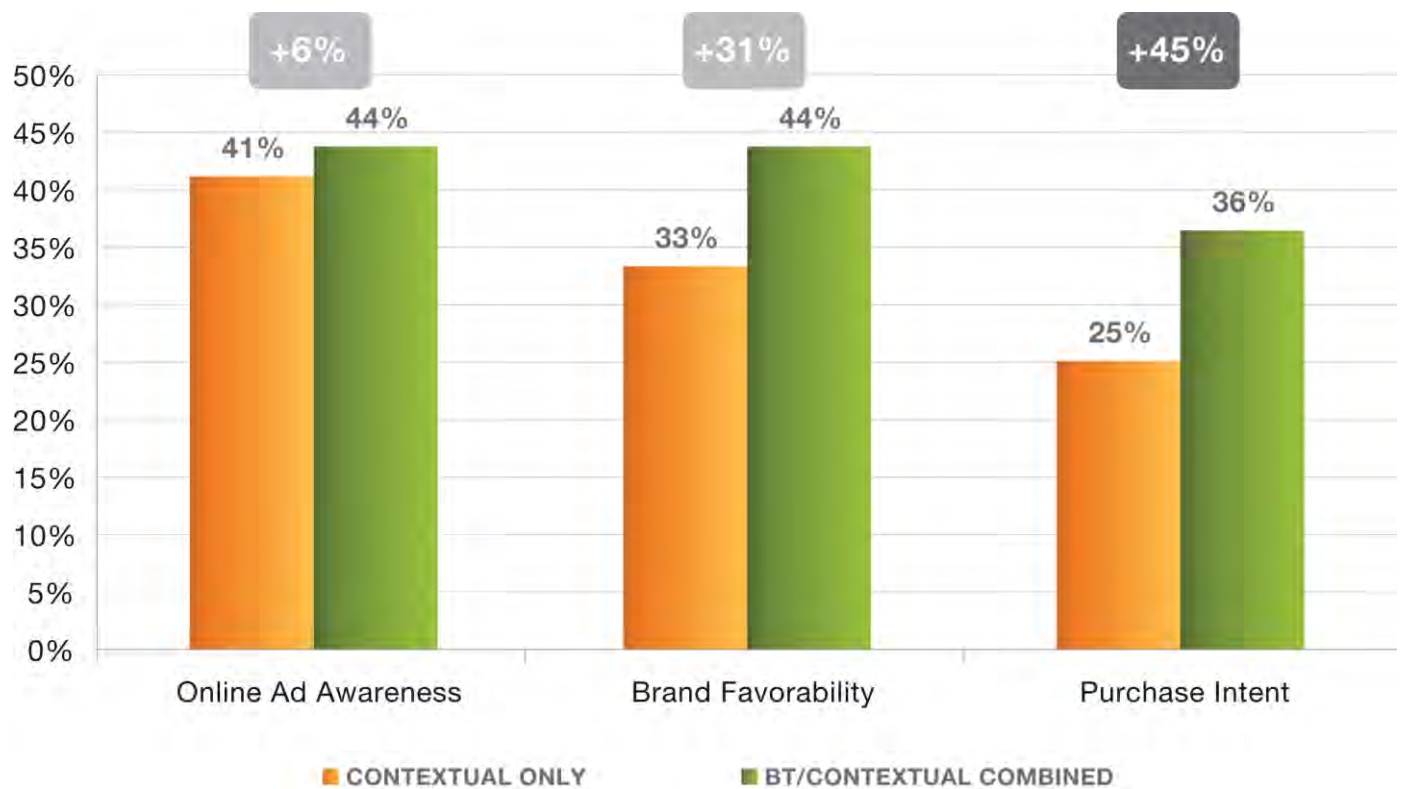
All levels of the purchase funnel – from brand-related metrics to leads – were influenced by combining contextual and BT, demonstrating engagement with the brand throughout the buying cycle.

- Up to a **70%** increase in purchase intent, brand favorability, and awareness among consumers
- Up to a **130%** increase in specific brand perceptions
- Share of shopping on Jumpstart sites improved as much as **17%**
- Share of leads submitted on Jumpstart sites improved as much as **41%**

Total Study Results

Brand Metrics - Improvements in online ad awareness (+6%), brand favorability (+31%) and most importantly purchase intent (+45%) were realized when both types of targeting were utilized vs. contextual targeting alone. As purchase intent is one of the most difficult metrics to influence through online advertising, this study achieved an exceptional lift for an online campaign (see Table 2.1).

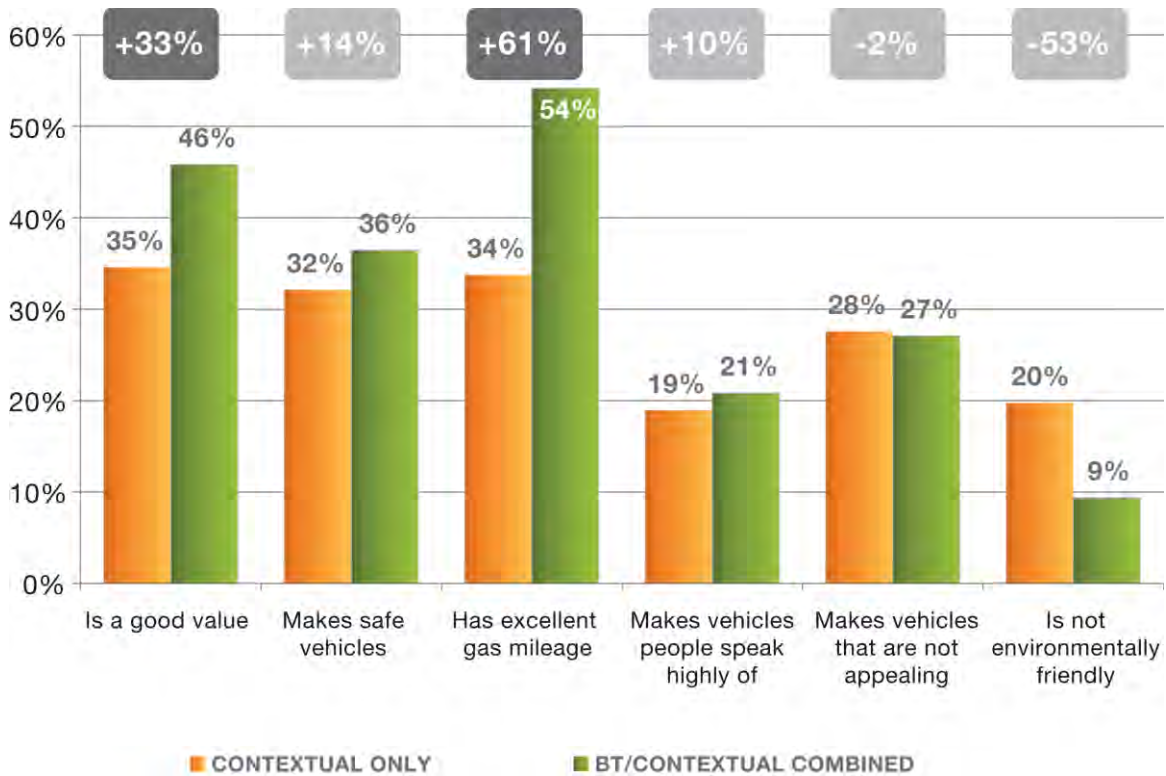
Table 2.1 Brand metrics results – total study – Insight Express 2008



Brand Perception Metrics – When specific statements relative to both the import and domestic brands were posed to consumers, sizeable shifts in consumer perception were recognized when exposed to the marketers’ message in both contextual and behavioral environments. The “value” and “gas mileage” messages were prevalent in the creative messaging and it’s demonstrated by these results (see Table 2.2):

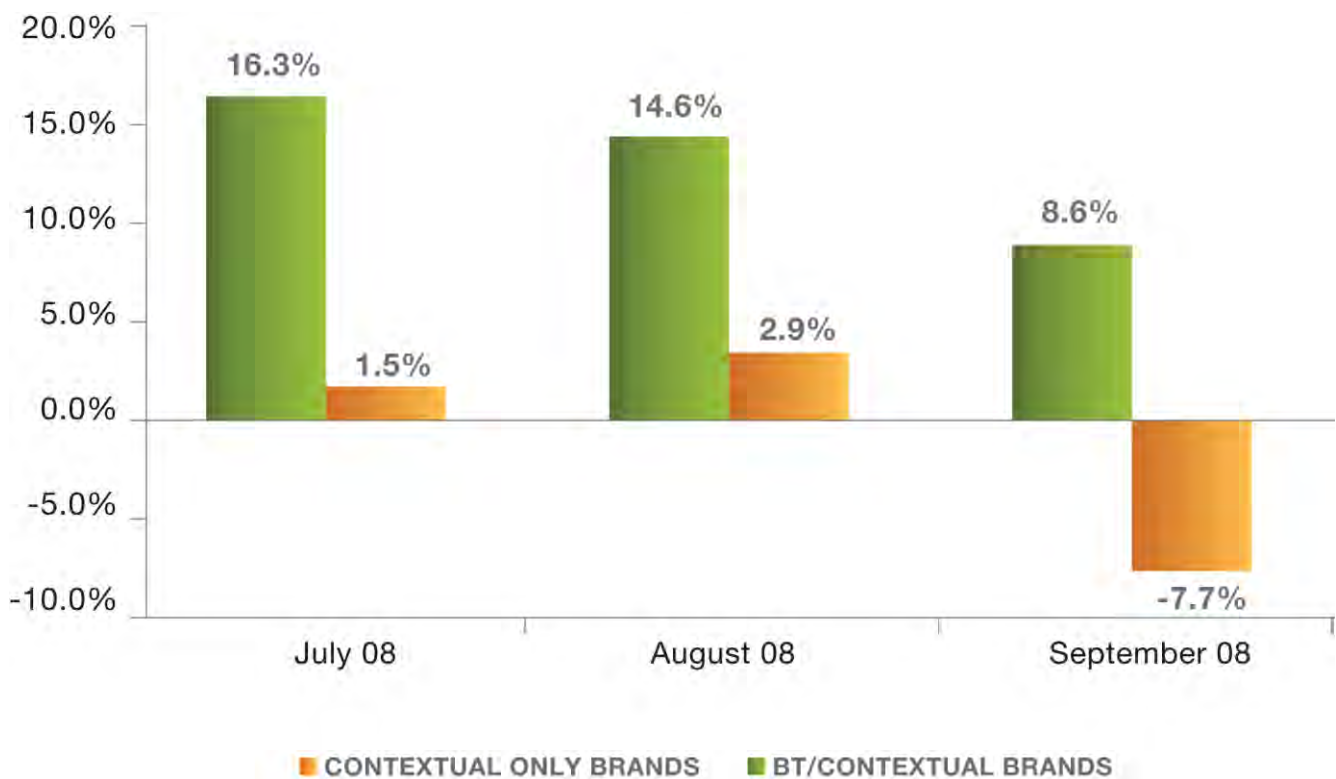
- The statement “Has excellent gas mileage” was a prevailing trend for both brands, enjoying a 61% lift in perception
- The statement “Is a good value” also resonated, with a 33% increase
- The statement “Is not environmentally friendly” was turned in favor of the involved brands after their message was targeted contextually and behaviorally (-53%)

Table 2.2 Brand perception results – total study – Insight Express 2008



Share of Shopping – Moving the share of shopping needle is a difficult task to accomplish on third-party auto research sites, but in this instance both brands experienced a sizeable lift in its share – as high as 16% increase in share of shopping compared to the previous quarter. We compared the two studied brands to two other comparable brands which had only employed contextual targeting on Jumpstart’s sites during the months analyzed, and the difference for the marketers employing both BT and contextual targeting was significant (see Table 2.3).

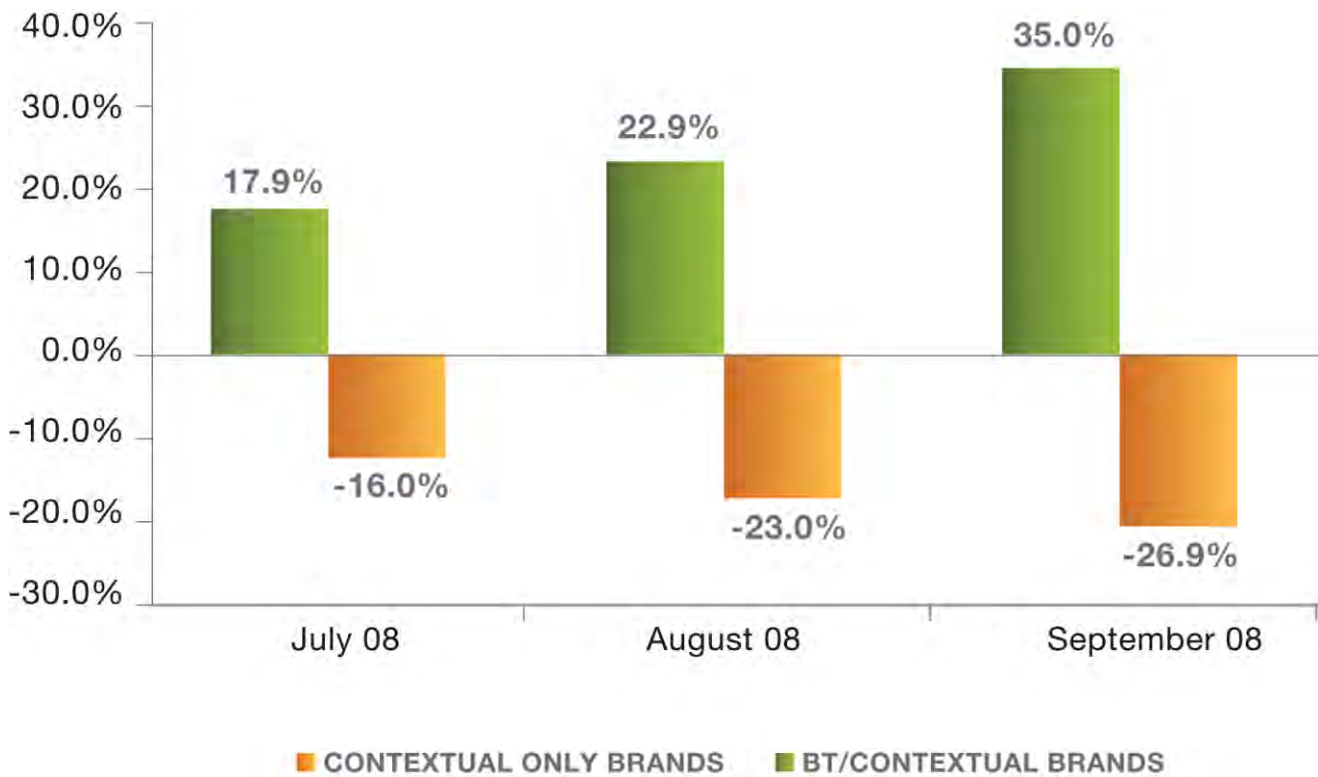
Table 2.3 Share of Shopping results – total study – Jumpstart Strategic Insights 2008



- Compared with brands that ran only contextual campaigns during the same period.
- The brands that executed the combined strategy enjoyed a sustained impact in Sept. from the previous two months, during which the campaign was active.

Share of Leads Submitted – The lowest distinguishable point in the automotive purchase funnel is the submitted lead, or “request-a-quote”. These are consumers that are ready to be contacted by a dealership and serious about making a purchase relatively soon. The brands in this study found that BT and contextual targeting ratcheted lead volume up considerably when compared to similar advertisers only employing contextual targeting – as high as 23% during the combined campaign, and an enduring effect as high as 35% for the following month (see Table 2.4).

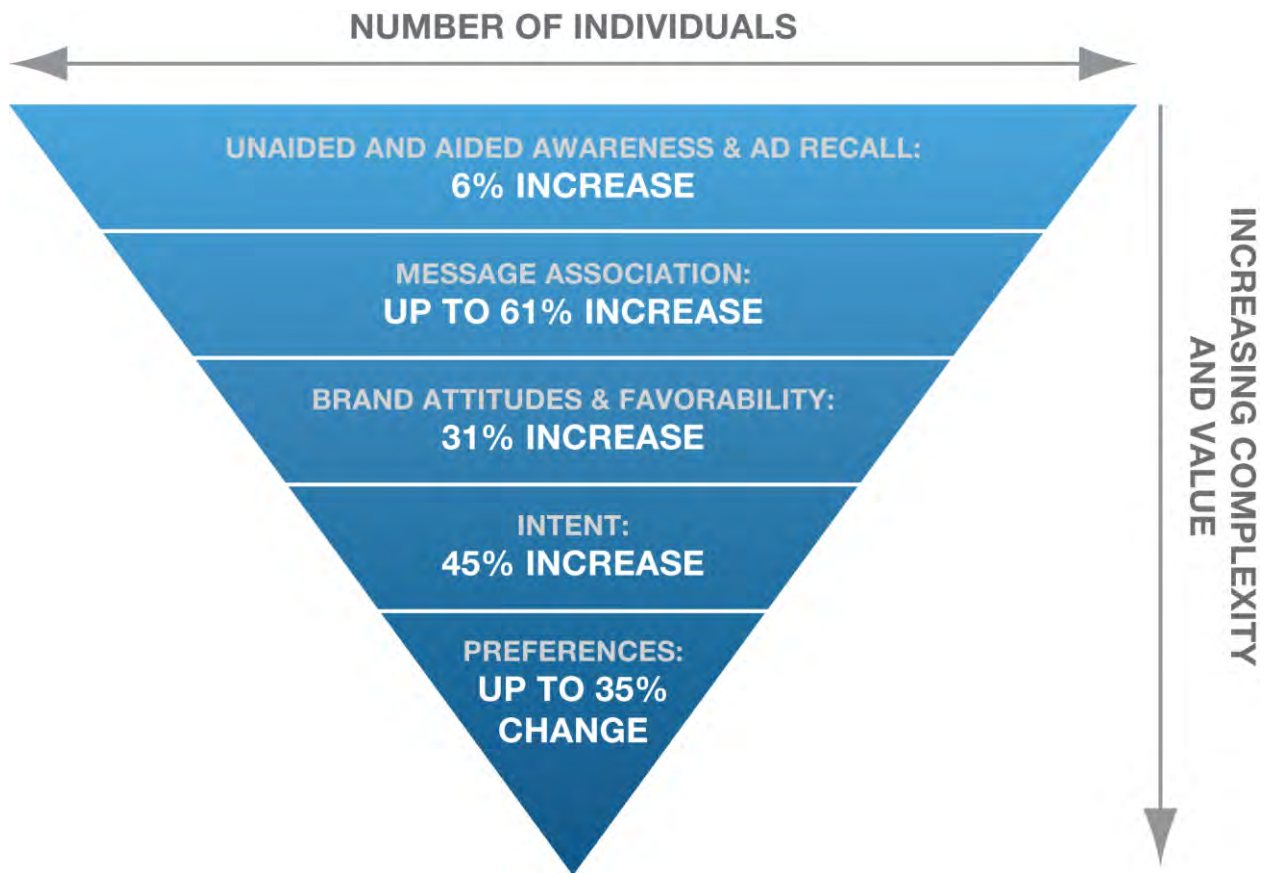
Table 2.4 Share of Leads results – total study – Jumpstart Strategic Insights 2008



- Compared with brands that ran only contextual campaigns during the same period.
- The brands that executed the combined strategy enjoyed a sustained impact in Sept. from the previous two months, during which the campaign was active.

Stages of Brand Development and Engagement – In summing up the various stages of engagement with the brands that were studied, all points in the purchase funnel were impacted significantly when BT and contextual were used together. From the broadest level of engagement - consumer awareness – to the closest point in the funnel prior to an actual vehicle sale – a submitted new car request-for-quote. (see Table 2.5).

Table 2.5 Brand development stages for both brands



Domestic Brand Study Results

Domestic Brand Overview and Results: The domestic advertiser in this study employed messaging focused on fuel efficiency, utilizing a “green” message. All points of the funnel were influenced by the messaging when delivered in both environments. The Brand Favorability metric asks the consumer about their opinion of the brand – in the case of this domestic automaker, the BT/Contextual strategy clearly increased positive opinion. The advertiser enjoyed a 77% increase in favorability and a 35% increase in purchase intent, while also achieving demonstrable lifts in share of shopping (up to 17%) and share of leads submitted (up to 41%).

The clear victory for the domestic marketer in this instance was the fact that its message truly resonated with in-market consumers, and most significantly when using contextual and behavioral targeting to deliver the message. Proving that the fuel efficiency message was impactful, when asked if the brand associated with the statement “Has excellent gas mileage”, perception increased by 114% for those seeing the ad in contextual and behavioral situations.

Also, responses to the statement “Is not environmentally friendly” decreased by 47% for the domestic brand with consumers who had seen ads in both locations (see Tables 3.1-3.5)

Table 3.1 Brand metrics results – domestic advertiser – Insight Express 2008

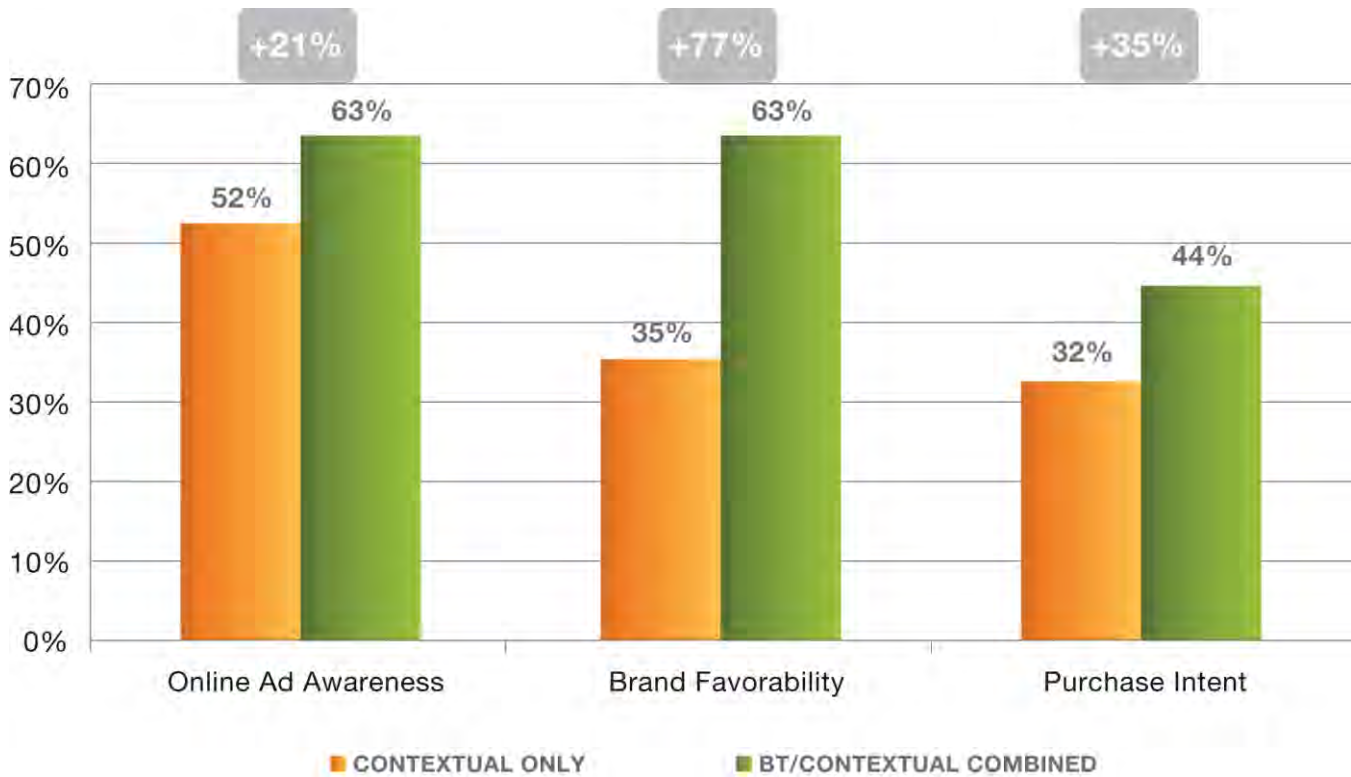


Table 3.2 Brand perception results – domestic advertiser – Insight Express 2008

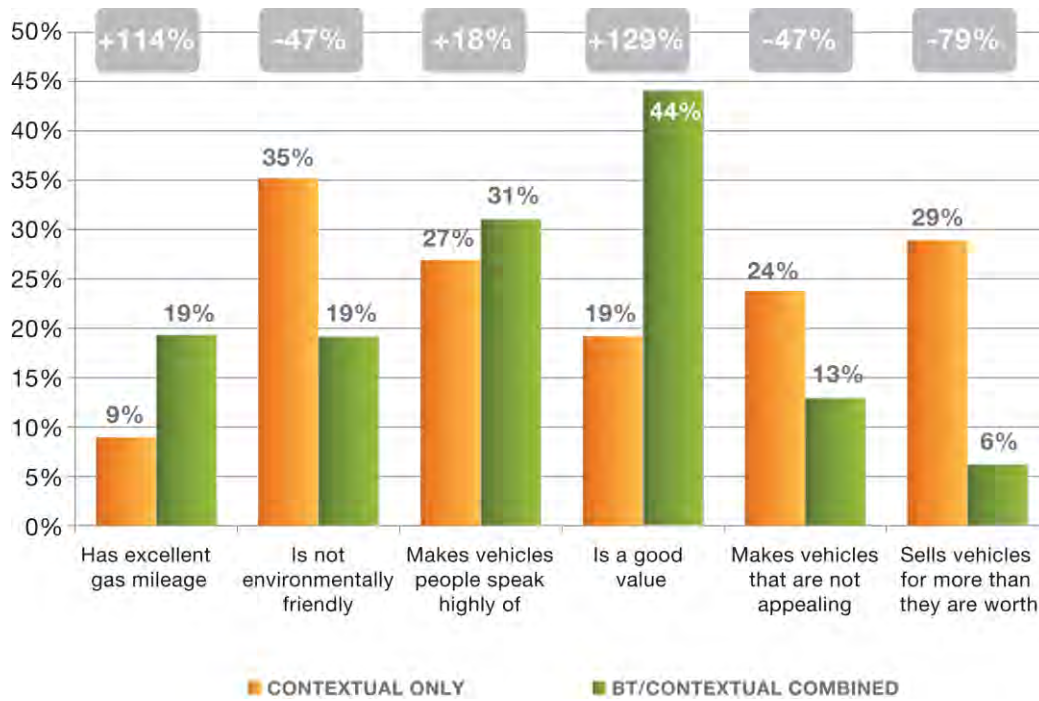
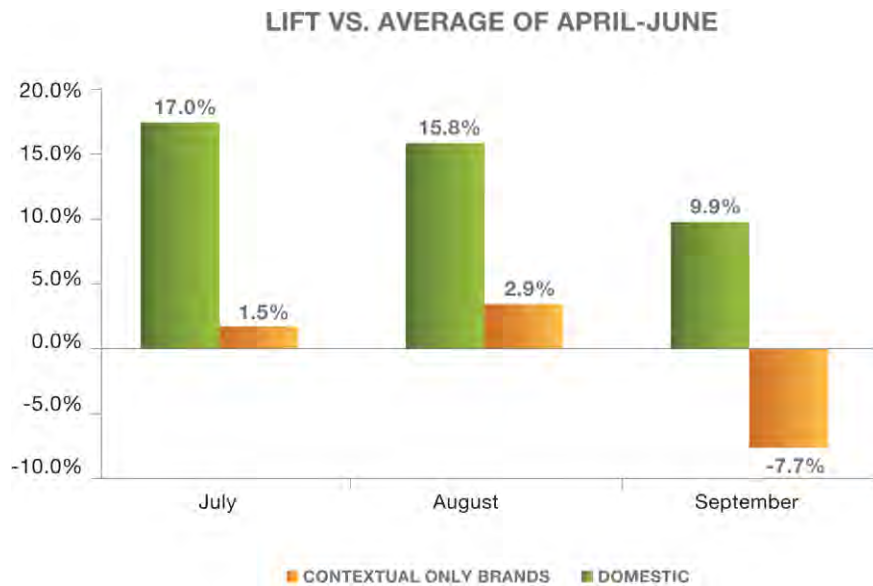
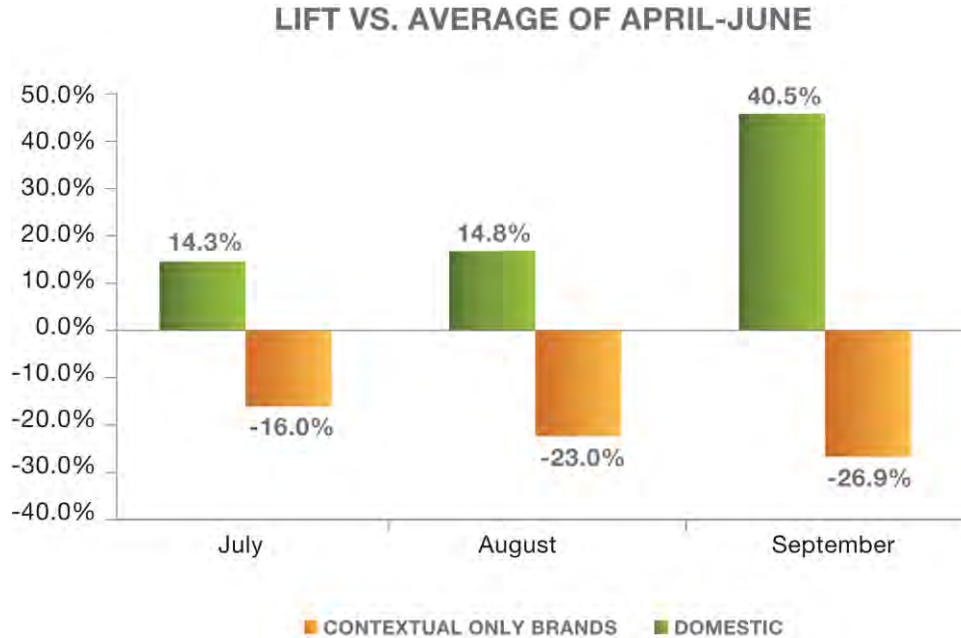


Table 3.3 Share of Shopping results – domestic brand – Jumpstart Strategic Insights 2008



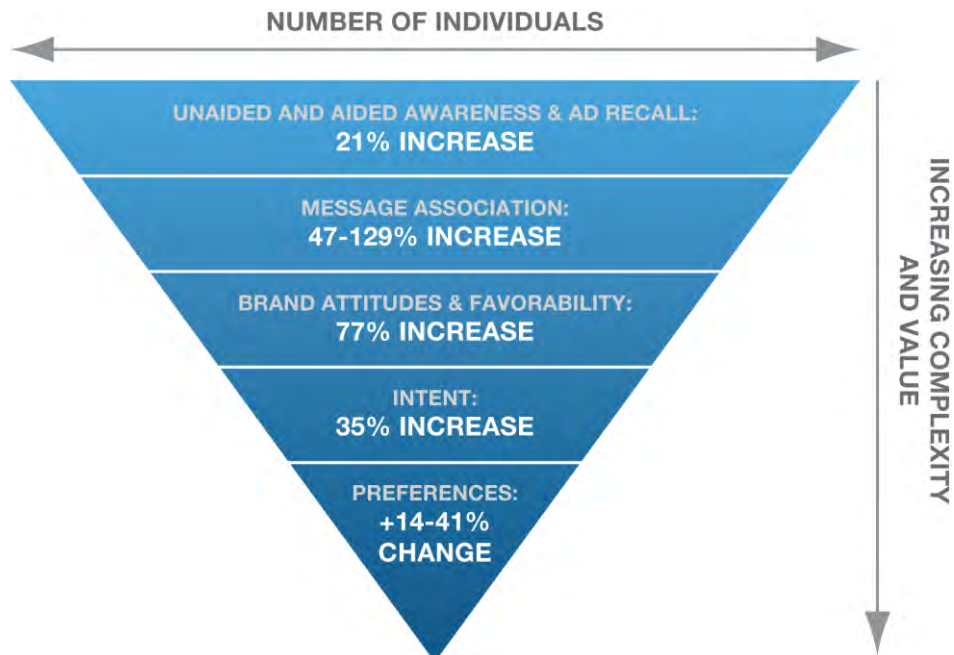
- Compared with brands that ran only contextual campaigns during the same period.
- The brands that executed the combined strategy enjoyed a sustained impact in Sept. from the previous two months, during which the campaign was active.

Table 3.4 Share of Leads results – domestic brand – Jumpstart Strategic Insights 2008



- Compared with brands that ran only contextual campaigns during the same period.
- The brands that executed the combined strategy enjoyed a sustained impact in Sept. from the previous two months, during which the campaign was active.

Table 3.5 Brand development stages for domestic brand



Import Brand Study Results

Import Brand Overview and Results: The import advertiser in this study employed messaging that was value-based and focused on financing and cash-back incentives. Once again, all points of the funnel were influenced by the messaging when delivered in both environments. Resonating with the value-based, low-funnel nature of the message, purchase intent skyrocketed to a 57% increase from the contextual to the contextual and behavioral targeted groups surveyed. Brand favorability grew by 23% and despite the fact that the messaging wasn't pertinent, the statement "Makes safe vehicles" jumped in perception by 63%. Other perception measures that improved for the import brand included the statements "Is a good value" (14%) and "Makes vehicles people speak highly of" (18%).

Since the marketer's message was focused on near-term buyers, their mission was accomplished with behavioral and contextual targeting thanks to the aforementioned purchase intent lift, as well as significant increases in share of shopping (up to 14%) and share of leads submitted (up to 41%) (see Tables 4.1-4.5).

Table 4.1 Brand metrics results – import advertiser – Insight Express 2008

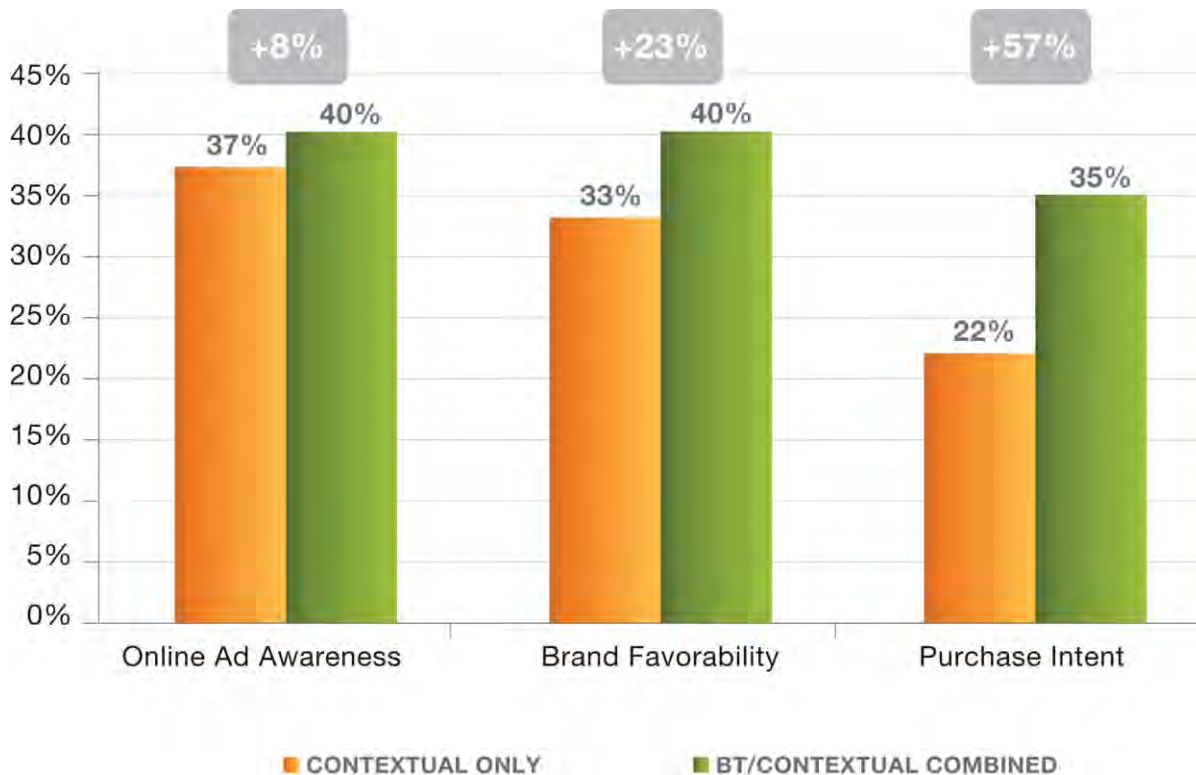


Table 4.2 Brand perception results – import advertiser – Insight Express 2008

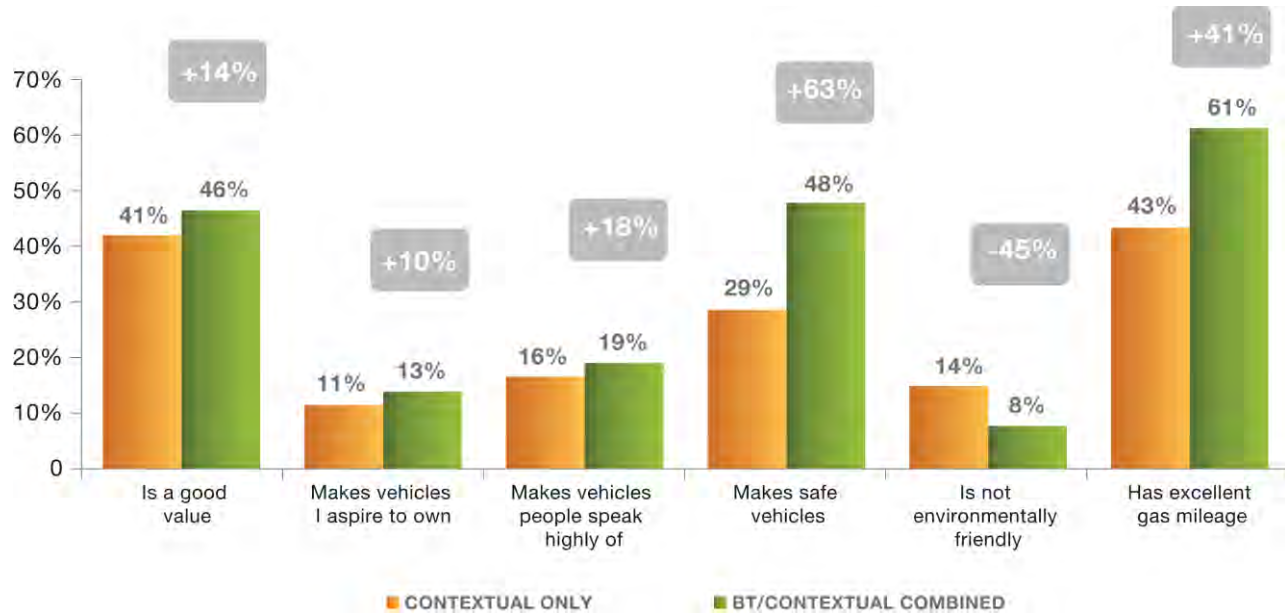


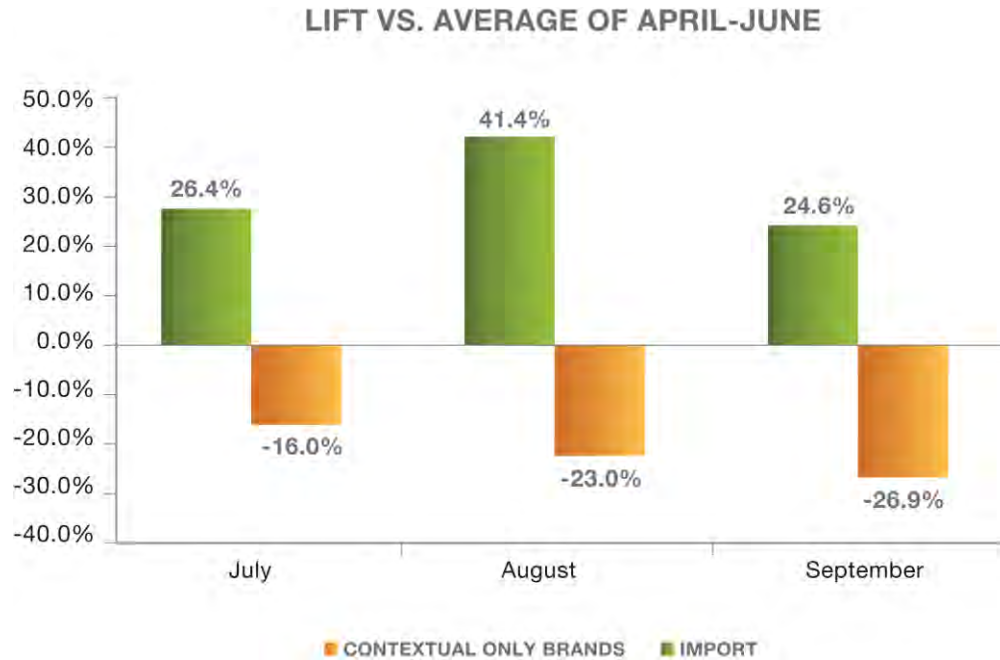
Table 4.3 Share of Shopping results – import brand – Jumpstart Strategic Insights 2008

LIFT VS. AVERAGE OF APRIL-JUNE



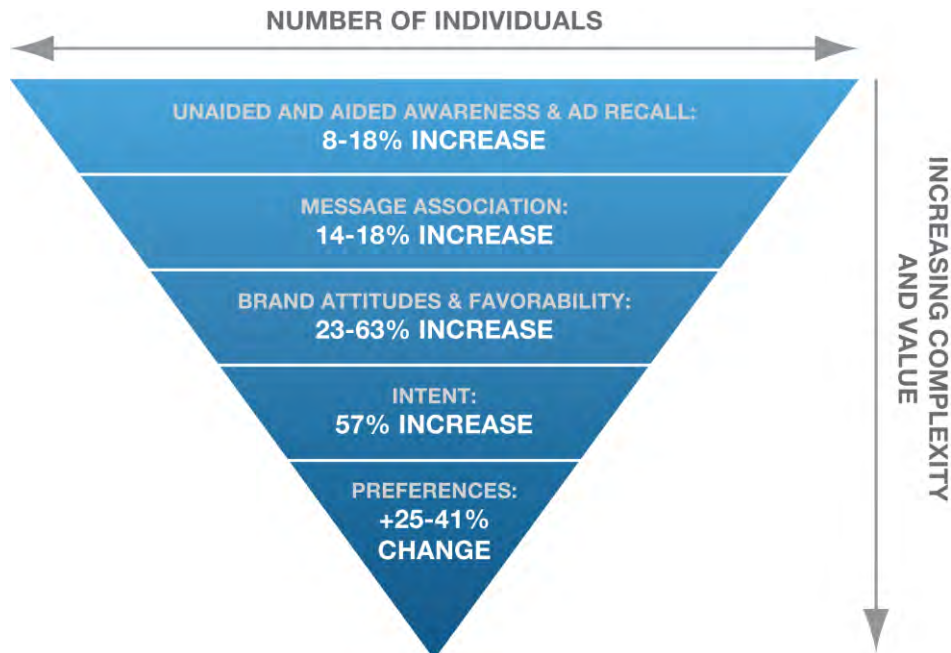
- Compared with brands that ran only contextual campaigns during the same period.
- The brands that executed the combined strategy enjoyed a sustained impact in Sept. from the previous two months, during which the campaign was active.

Table 4.4 Share of Leads results – import brand – Jumpstart Strategic Insights 2008



- Compared with brands that ran only contextual campaigns during the same period.
- The brands that executed the combined strategy enjoyed a sustained impact in Sept. from the previous two months, during which the campaign was active.

Table 4.5 Brand development stages for import brand



Conclusions

For a category like automotive, contextual media via third-party research sites represents the most important audience in the media mix as it delivers the sweet spot of targeting opportunities to:

- An audience that's in the shopping mode for a large purchase only made every 3-4 years
- A platform in which a consumer's make and model purchase decision can be influenced

As demonstrated in this study, behavioral targeting enhances and augments the communication with this valuable audience to fully maximize the potential of targeting an in-market consumer.

Contextual targeting proves more effective when deployed in conjunction with BT

- The combination amplifies frequency of message to the right audience and thus delivers a significantly stronger impact.

All levels of the purchase funnel experienced significant lift

- Combining behavioral and contextual targeting efforts influenced metrics and engagement at all levels of the funnel – from brand-related responses through to leads submitted.

Bucketing media plans based on targeting criteria (i.e. behavioral budget, contextual budget) is an inefficient approach to reaching true in-market shoppers

- Targeting a specific audience of in-market shoppers (i.e. SUV shoppers) based on shopping patterns -- regardless of where the message is delivered to them -- is a more efficient and effective approach to in-market media than bucketing plans based on targeting criteria.

Purchase Intent was influenced dramatically

- Influencing purchase intent is one of the most difficult tasks to accomplish with online advertising, yet this study demonstrated that intent is substantially impacted by combining contextual and BT strategies.

Share of shopping lift achieved with combined targeting tactics

- Combining targeting tactics allowed the analyzed brands to significantly increase share of shopping – clearly an important metric when considering that the effort drove more consumers down the funnel – increasing activity on the brands' make/model pages.

Improved share of leads demonstrates success and active engagement at the cusp of actual purchase

- Share of leads submitted on Jumpstart's sites is the lowest funnel activity short of a vehicle sale – and the impact of these brands' blended targeting approach drove sizeable incremental value in the form of requests for a price quote.

Both targeting disciplines *together* drive home and maximized frequency of the message

- Where contextual targeting falters on its own is that in-market consumers only spend a small percentage of time actually shopping for cars when they're online. This study indicates that in-market consumers welcome and respond to the automotive message also when they're outside the third-party site environment, which allows the marketer to fully capitalize on the short window of time the consumer is in-market.
- Adding BT strongly reinforces the message that was seen in the auto content setting.

Sources

1. Source: Capgemini CarsOnline 07/08
2. Source: J.D. Power and Associates 2007 New Autos shopper.com Study; Based to AIUs (Automotive Internet Users)
3. Source: Northwood University and Autotrader.com: 2008 Dealer Walk-in Study – July 2008
4. Source: Search Engine Marketing Professional Organization survey of SEM agencies and advertisers, Nov. 08 – Jan. 09

Study Info and Methodology

The Facts

- The campaigns utilized took place in July and August of 2008
- 1275 consumers completed surveys over the course of those two months
- We isolated one import brand and domestic brand campaign for this study
- We compared the responses of consumers who were exposed to messaging only through contextual targeting on our 3rd-party auto sites vs. consumers who were exposed to messaging from the two brands via contextual and behavioral targeting
- We used Jumpstart's internal data files for information on Share of Shopping and Share of Leads submitted
- We analyzed share of shopping for the two brands in the study prior to, during and after the campaign in which a combined BT and content targeted strategy was utilized
- We also analyzed share of shopping for two competing brands that only employed contextual targeting during the same time period
- We analyzed the share of leads submitted for the two brands in the study prior to, during and after the campaign in which a combined BT and contextual targeted strategy was utilized
- We also analyzed the share of leads submitted for two competing brands that only employed contextual targeting during the same time period

Data Collection Objectives

- Collect detailed data on Jumpstart site visitors that will provide information about consumers':
 - Relative awareness of specific car brands
 - Awareness of Online Advertising for specific car brands

- Opinion of specific car brands
- Likelihood of purchase for specific car brands
- Impact online advertising from specific car brands had on their perception
- Show increases in the above data between two types of consumers:
 - Those who only saw contextual advertising from one car brand
 - Those who saw both contextual and behavioral advertising from one car brand
- Report on share of shopping and share of leads submitted for the brands studied vs. brands that were only actively running contextual ad campaigns

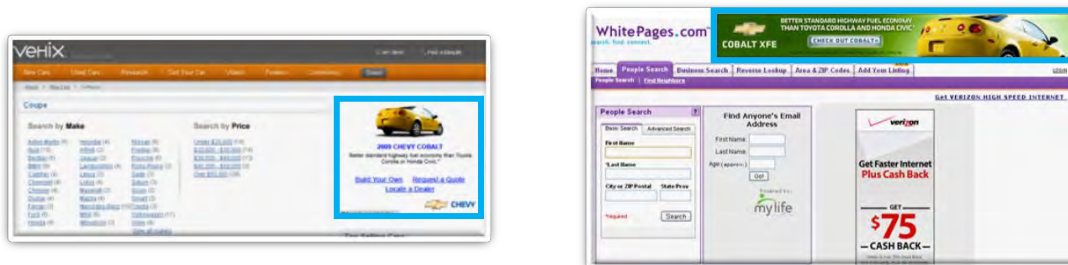
Qualified Shoppers

- More than 80% of those surveyed indicated they were actively in-market for a car
- 53% of those surveyed indicated they would purchase a car within a year

Behavioral Targeting: In addition to contextual placements on our 3rd-party auto sites, we collected data from users through behaviorally targeted placements (see table 5.1).

- Jumpstart is able to re-message visitors back on our sites as one mechanism for BT ... and through an extended network of thousands of publishers once we identify a consumer as in-market for a vehicle

Table 5.1 Behavioral Targeting images



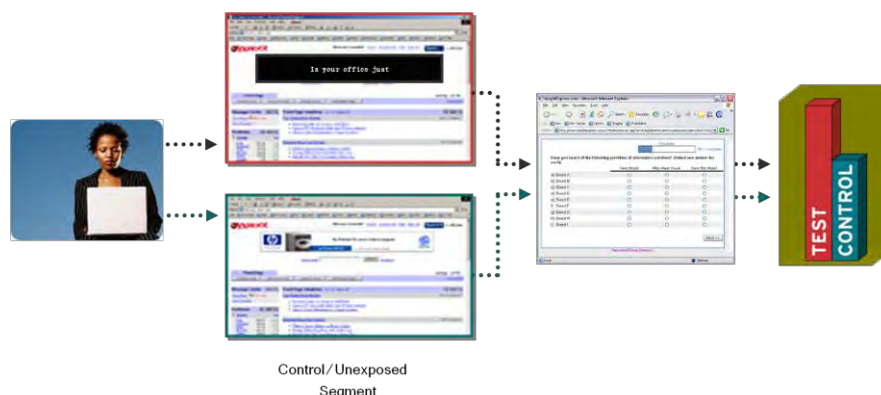
Share of Shopping: We analyzed share of shopping for the two brands in the study prior to, during and after the campaign in which a combined BT and contextual targeted strategy was utilized. We also analyzed share of shopping for two comparable brands that only employed contextual targeting during the same time period. In both cases we used an average of the three months prior to the start of the campaign as the basis for comparison.

Share of Leads Submitted: We analyzed the share of leads submitted for the two brands in the study prior to, during and after the campaign in which a combined BT and contextual targeted strategy was utilized. We also analyzed the share of leads submitted for two comparable brands that only employed contextual targeting during the same time period (the same competing brands were utilized for share of shopping and share of leads). In both cases we used an average of the three months prior to the start of the campaign as the basis for comparison.

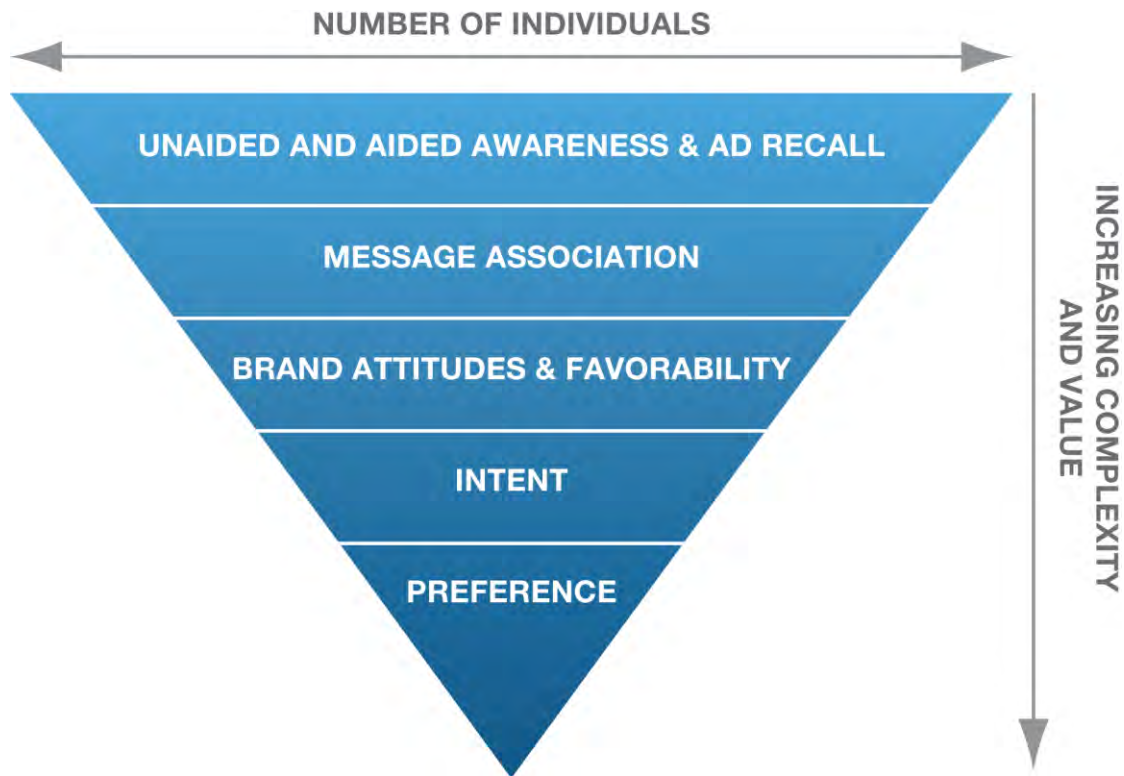
Definitions

- **Unaided Brand Awareness:** *When thinking of vehicles, what brand comes to mind FIRST?*
- **Aided Awareness:** *Have you heard of the following brand of vehicles? (Select one for each answer for each)*
- **Online Ad Awareness:** *Have you seen any ONLINE ADVERTISING for the following within the past 30 days? (Select one answer for each)*
- **Brand Favorability:** *What is your overall opinion of each of the following brands? (Select one answer for each)*
- **Purchase Consideration:** *The next time you are looking for buy or lease a new vehicle, how likely are you to consider the following brands? (Select one answer for each)*
- **Contextual Advertising:** *Automotive advertising served on an automotive-relevant content page*
- **BT/Contextual Combined Advertising:** *Automotive advertising served to a person who has shown interest in shopping for a vehicle, regardless of the context of the content they are viewing*
- **Brand Attributes:** *Please indicate if the statements below describe each of the following brands by checking all the brands that are described by each statement. If any of the statements describe none of the brands, select "None of these"*
 - *Is a good value*
 - *Makes safe vehicles*
 - *Has excellent gas mileage*
 - *Makes vehicles people speak highly of*
 - *Makes vehicles I aspire to own*
 - *Makes vehicles that are not appealing*
 - *Sells vehicles for more than they are worth*
 - *Is not environmentally friendly*
- **Share of Shopping:** *The % share of unique users researching a specific auto manufacturer's brands vs. all other brands on Jumpstart's sites*
- **Share of Leads Submitted:** *The % share of 'request-a-quote' leads submitted for a specific auto manufacturer's brands vs. all other brands on Jumpstart's sites*

Insight Express AdInsightsSM: The Process



Stages of Advertising and Brand Development



Stage 1 (Unaided and Aided Awareness & Ad Recall): Consumers are aware of your brand and remember your ads

Stage 2 (Message Association): Consumers recognize your message and specifically relate it to you

Stage 3 (Brand Attitudes & Favorability): Consumers develop feelings toward your brand, and they compare your brand to others

Stage 4 (Intent): Trust develops and consumers plan to visit, purchase, or take other action

Stage 5 (Preference): Consumers purchase and prefer your brand over all others—developing loyalty and long-term relationships



Increase Message Impact & Efficiency

Behavioral and contextual targeting in tandem are effective in amplifying message impact, frequency and in driving marketer-defined metrics

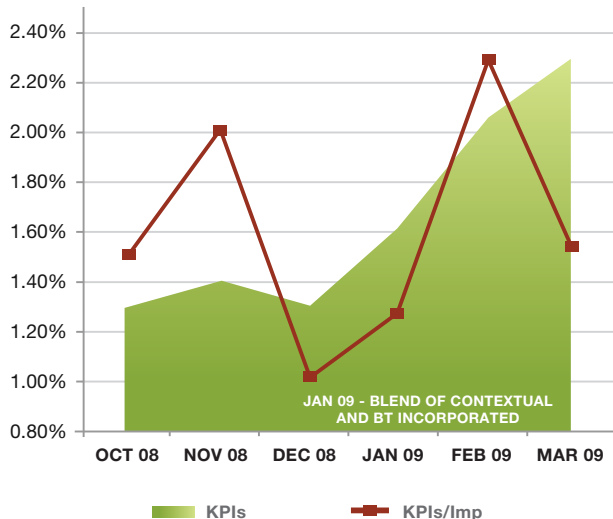
Increase Message Impact & Efficiency

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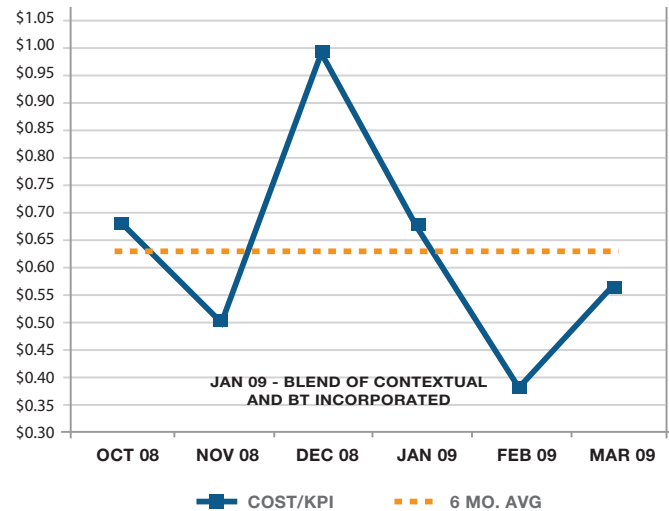
Key Findings

- **122%** increase in Key Performance Indicators when employing both targeting strategies in tandem (see Graph A)
- **26%** decrease in cost per KPI and a **15%** increase in KPI per impression occurred from campaign optimizations due to combined strategies (see Graph B)
- Through testing campaign optimization was achieved in February (see Graph A & B)

GRAPH A - KPI IMPROVEMENTS



GRAPH B - COST-PER-KPI IMPROVEMENTS



Study Objective: To break down the silos that call for separate media buying strategies for contextual and behavioral targeting, and demonstrate how when employed together, they are effective in driving marketer-defined metrics.

Methodology: Optimization tests began in 2009 to help evaluate spotlight activity on OEM websites from Jumpstart shoppers and were compared to the previous three months. Also, patterns in success metrics as determined by OEM and its agency were followed.

A complete analysis of this study can be found on www.jumpstartautomotive.com

White Paper: October 2009

Increase Message Impact & Efficiency

Behavioral and contextual targeting in tandem are effective in amplifying message impact, frequency and in driving marketer-defined metrics.

Background

In Part I of this study we used qualitative consumer survey data and quantitative third-party auto site data to demonstrate the impact of blending behavioral and contextual targeting for maximum effectiveness when marketing to auto shoppers. When embarking on Part 2, our objective was to close the loop on this discussion by adding in qualified marketer-defined metrics to exhibit the success of this strategy.

There is unquestionable growth in the acceptance and effectiveness of Behavioral Targeting (BT) as a display advertising strategy. As a mechanism for advertisers to capture finite audiences and message to them in various contexts, it delivers on the promise that internet marketing can distribute ads to finely tuned pre-qualified audiences without waste. And for publishers, the ability to monetize unsold inventory by re-engaging valued audiences for marketers has added new revenue streams and improved inventory yield.

There's also the perception that horizontal ad networks and exchanges have muddied the waters on behaviors and how/where they are obtained and repurposed or repackaged. It's not uncommon that an ad network will sell inventory against a behavior that has exchanged hands 3-5 times before reaching it. This brings into question the value and validity of the behavior, especially when the methodology for collection is not typically determined by the outlet selling it.

In 2005 Jumpstart Automotive Group launched its BT program, the first that was exclusive to the automotive industry. It was unveiled with the intention that marketers needed assurance that the audience was meeting their target criteria of being in-market, engaged, and current. With that Jumpstart's BT product was introduced with complete transparency of the sites it collected data from and the methodology. This new product was also developed without layers of complexity or repackaged behaviors.

It was initially sold as a stand-alone product to marketers as an opportunity to reach specific types of consumers ranging from a new car shopper to a more specific category or model shopper (i.e. Crossover or Ford Escape), which mimicked the contextual marketing options that Jumpstart was delivering to manufacturers, dealers and dealer groups.

With some in-depth research and observation of recurring themes, a defining moment was achieved in 2008 that offered marketers a more robust solution with BT as opposed to simply offering up more inventory. This moment was validated when Jumpstart embarked on a study with the goal of changing automotive marketers' perceptions of BT as a tactic that is independent of any other display advertising approach. The study, *Maximizing Automotive In-*

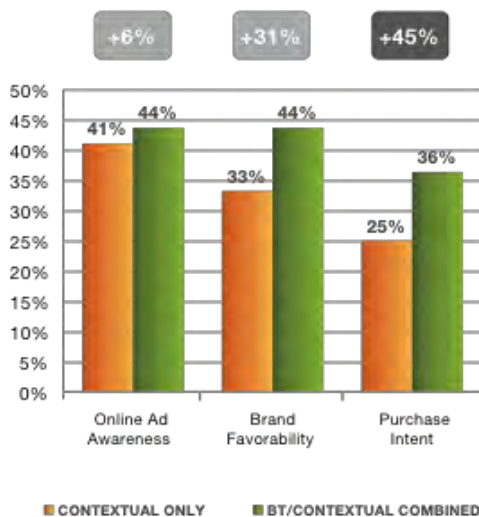
Market Targeting: A study on the effectiveness of Behavioral and Contextual targeting as a cohesive strategy was released in April 2009.

It achieved the aforementioned goal by accentuating the strength of this blended targeting approach through a series of consumer surveys regarding perceptions of two auto manufacturer brands. The survey results show the difference between consumers who had seen ads from the marketers only in a contextual environment, and those who had been exposed to ads from the marketers both contextually and behaviorally.

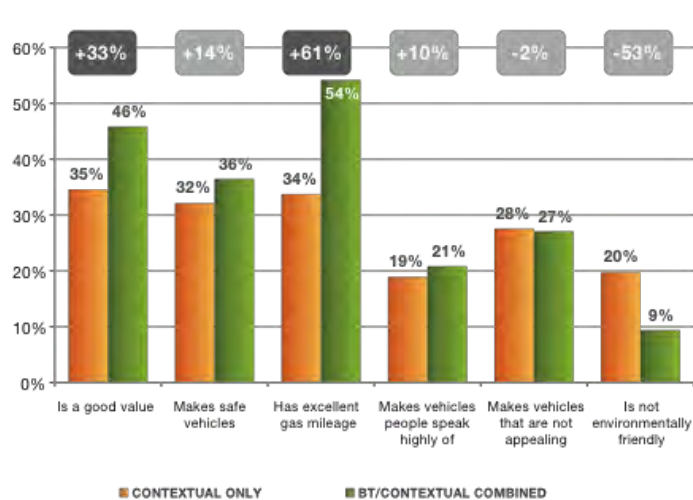
In each case – whether it was simple awareness, various brand perceptions, or even purchase intent – the consumers exposed to the marketers’ message in both scenarios had markedly stronger perceptions of the brands. (See Table 1.1)

Table 1.1 Results from the first “Maximizing Automotive In-Market Targeting” Study

BRAND METRIC RESULTS



BRAND PERCEPTION RESULTS



While most of the results of the *In-Market Targeting* study centered on consumer surveys, the analysis in this new study takes into account marketer-specific key performance indicators that were measured and analyzed via the marketer’s ad tracking tool.

What the 2008 study didn’t contain in marketer-defined results is uncovered here with an OEM advertiser that has reaped the benefits of employing this blended targeting approach. Both this and the 2008 study provide considerable evidence that BT or contextual targeting delivered in a silo is less effective for automotive marketers than the two in tandem.

Study Objectives

- To accentuate how combining contextual and behavioral targeting amplifies message impact and frequency, driving improved results and engagement.
- To break down silos created industry-wide that call for separate media buying strategies for contextual and behavioral targeting.
- To bring to light the original intention of BT as a truly efficient targeting mechanism to a valuable, identifiable audience and move beyond the muddled waters of BT created over the past few years.

Methodology

- Review spotlight data from Jumpstart campaigns from OEM websites to follow patterns in success metrics as standardized and determined by the OEM and its agency.
- Analyze the data over a 6-month period.

Highlights of Results

- **122%** increase in total volume of key performance indicators (KPIs)
- **26%** decrease in cost per KPI
- **15%** increase in KPIs/impression
- **1.33:1** ratio of KPIs to new impressions purchased

KEY PERFORMANCE INDICATORS IMPROVE WITH ADDITION OF BT

Most auto manufacturers and their agencies set clear standards for the performance of their in-market media buys, typically with an intense focus on low-funnel activities that occur on the OEM website like request a brochure, schedule a test drive, request a quote, and others.

In 2009, Jumpstart collaborated with one of its OEM clients to improve its reach of a highly qualified audience by employing the blended BT and contextual targeting method. In 2008 the marketer had only focused its efforts on reaching the Jumpstart audience in a contextual environment. The new approach provided the manufacturer an enhanced messaging platform against the most engaged shoppers, allowing it to communicate with these users on automotive research pages as well as other in-market and general interest site pages.

The BT/Contextual approach also afforded Jumpstart the opportunity to optimize performance across its network of BT publishers, shifting weight to properties and categories that

performed more effectively. Another benefit was the ability to implement adjustments to the campaign (like frequency capping and creative size optimization) while it was still running.

By utilizing these benefits, the OEM saw substantial lifts in KPI performance, including **122%** more KPIs in Q109 compared to Q408 (nearly 235,000 more KPIs) when only contextual targeting was employed, as well as a **15%** improvement in KPIs per impression – the ratio of KPIs to impressions - and a **26%** decrease in cost-per-KPI.

For the blended targeting approach the marketer purchased 92% more inventory than the previous quarter of only contextual impressions, however the 92% increase in inventory yielded 122% more KPIs. This represents a **1.33:1** ratio of KPIs to new impressions purchased, further emphasizing the value of this blended approach to reaching the right audience (See Tables 2.1 and 2.2).

Optimization Mechanisms:

- Frequency optimization
- Balance of BT vs. Contextual
- Site extension optimization
- Creative size optimization

Table 2.1 Marketer’s Increase in total KPIs and KPIs per Impression Q109 vs. Q408

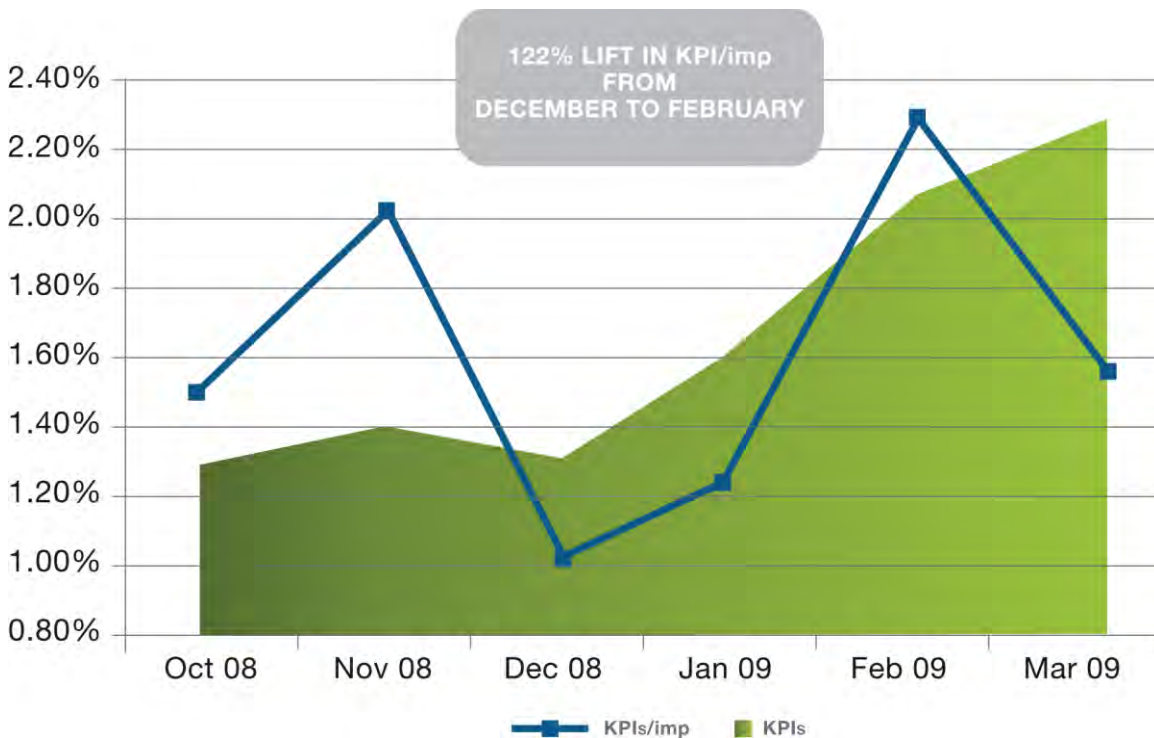
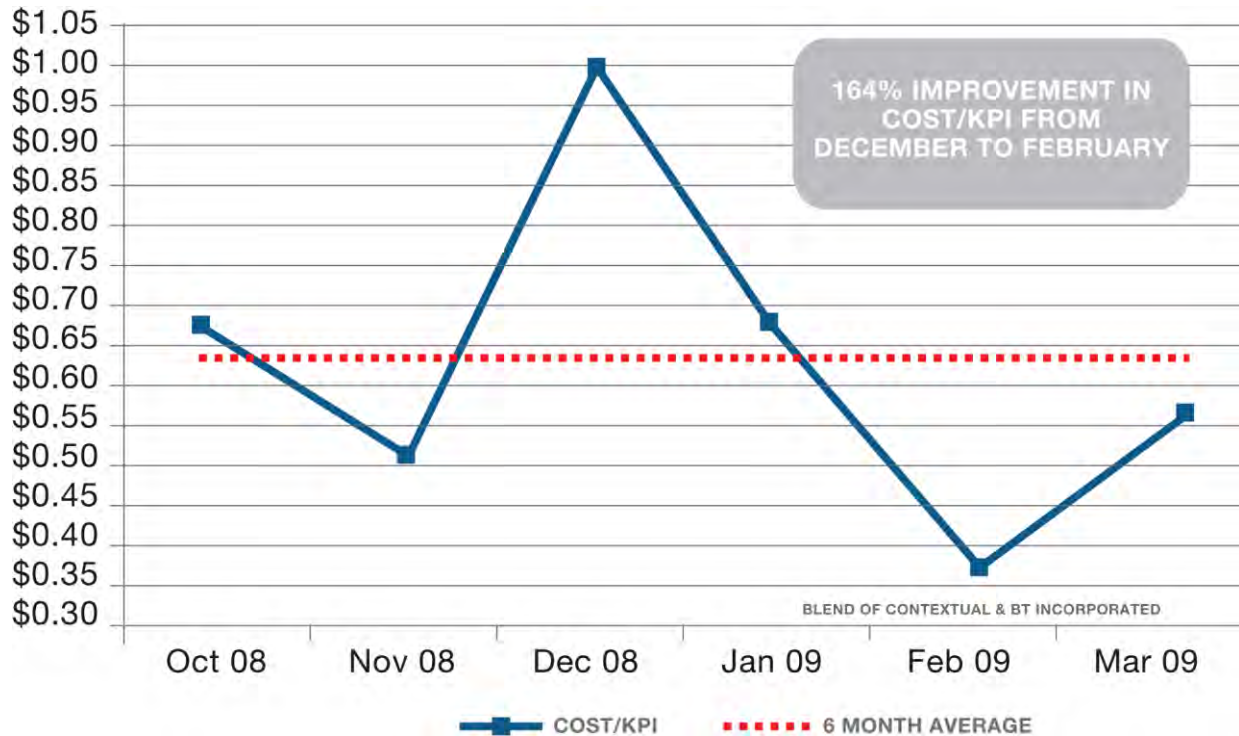


Table 2.2 Marketer's decrease in Cost Per KPI Q109 vs. Q408



Summary

- The blended Contextual/Behavioral targeting solution drove vast improvements in KPIs and media efficiency, two major factors in the marketing efforts of all automakers today.
- The benefits of extending reach against the OEM's most coveted shoppers by utilizing contextual and behavioral targeting in tandem include improved media performance and efficiency.
- Adding the BT element allowed Jumpstart to optimize performance using mechanisms unavailable with only a contextual campaign.



Drive Greater Brand Consideration

High-profile ad units and sponsorships help to increase consideration on third-party automotive sites

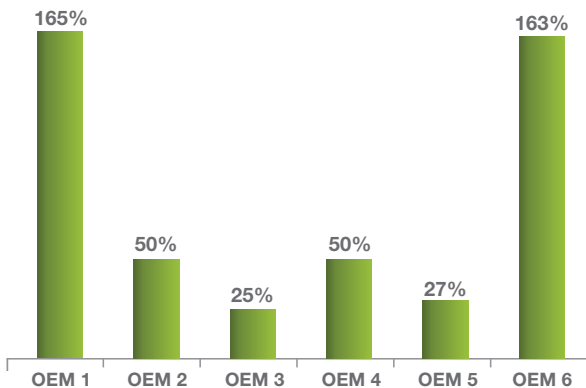
Drive Greater Brand Consideration

High-profile ad units and sponsorships help to increase consideration on third-party automotive sites.

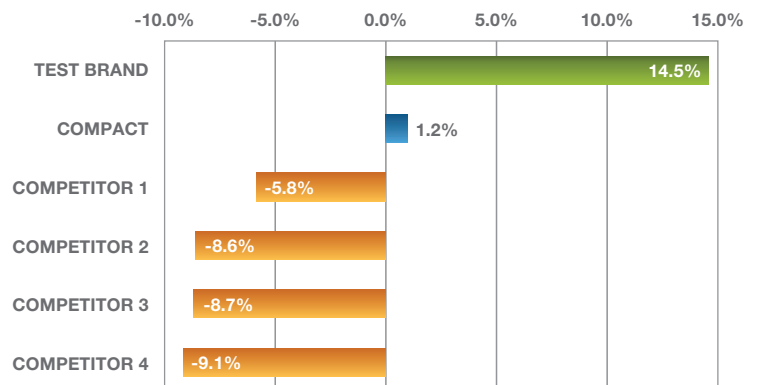
Key Findings:

- **34%** average lift in unique users and **42%** in make/model pageviews were recognized across all awareness campaigns
- **52%** average growth in share of segment shoppers from pre- to post- campaign periods for brands that employed awareness campaigns (see Graph A)
- **58%** average increase in brand consideration among competitive shoppers (see Graph B)

GRAPH A - OEM INCREASES IN SHARE OF SEGMENT SHOPPERS FOLLOWING AWARENESS CAMPAIGN



GRAPH B - VARIANCE IN SHARE OF COMPACT SEGMENT SHOPPERS



Study Objective: Provide a holistic view of the value of an awareness campaign by evaluating shopping activity and growth in consideration that was influenced by exposure to advertising on a third-party automotive website.

Methodology: Quantitative approach by evaluating brand traffic, share of Jumpstart shoppers against competitors in segment and competitive cross-shopping data as a result of an upper funnel awareness campaign; This study compiled results of 10 different campaigns on Jumpstart sites across widely variant brands.

White Paper: November 2009

Drive Greater Brand Consideration

The Broader Picture of Metrics: Boosting consideration and intent with high-impact placements.

Background

Automotive advertising and media spend have been under greater scrutiny at the manufacturer, regional association, and dealership levels over the past twelve months. As a result, marketers need to prove the greatest return on their marketing investments.

Third-party automotive websites have traditionally been an effective outlet for automotive advertisers to efficiently reach their target audience. Across Jumpstart Automotive Group's partner websites 72% of consumers state that they are in-market for a vehicle and nearly 60% of those consumers say that they will purchase within the year.ⁱ By researching vehicles, reading expert and consumer reviews, and looking at photos or videos, these consumers are raising their hands as car shoppers and providing advertisers the ability to get the appropriate messages in front of the right audience. This can provide a greater return on investment by eliminating much of the advertising waste that exists when profiling consumers based on demographics or psychographics alone.

IN-MARKET IS STILL AN UNDECIDED MARKET

Building brand awareness, establishing trust and maintaining perception of good quality and value are key challenges that marketers face. Traditionally, they have used mass reach forms of media such as television, magazines and web portals to accomplish these goals. It is often assumed that brand-building objectives have been met through these larger channels and that it's no longer necessary to reach consumers who are in-market with a brand building message.

The glaring flaw with this assumption is the belief that consumers already know what they want to purchase when they begin their online shopping and research. In reality, only 50% of shoppers that come to third-party sites even know which body style they are considering, let alone which specific model.ⁱⁱ A tremendous opportunity exists to build consideration for a make or model and influence the purchase decision of someone who is ready to buy. (See In-Market Strategy Appendix for more information.)

Because most vehicles are purchased offline, marketers cannot specifically equate online shopping activity to a transaction so they have found other methods of gauging the effectiveness of their digital advertising efforts.

Only 50% of in-market shoppers know which body style they will look for at their next vehicle purchase

Effectiveness Measures are Currently Flawed

Original Equipment Manufacturer (OEM) clients measure the effectiveness of their in-market advertising based on activities that take place on their own site once a consumer has either clicked on an advertisement or has come to their site after having viewed an advertisement on a third-party auto

site. These are often called conversions or key performance indicators (KPIs). The conversions that are most valued are those which indicate purchase intent. The goal is generally to identify the consumer and to get them closer to a dealership and ultimately a purchase.

In many cases these activities are assigned a weight or value based on the importance of the action. Third-party automotive sites are then held accountable for performance standards based on how well they convert shoppers to take action on the OEM site, and are benchmarked against competitors for cost efficiency. This has become the standard for in-market media, but it only represents a small portion of the shopping activities occurring.

Measuring these activities is an effective way to gauge the success of in-market advertising for those consumers who are close to their purchase decision. Naturally, a consumer who is close to deciding on a specific model may be more likely to download a brochure or request a quote from a dealer.

What's lacking is an account of the activity that is happening earlier in the shopping process. Despite the fact that over 70% of these shoppers are in-market to purchase within a year, they're not always immediately ready to respond to a pricing incentive by requesting a quote, or by going to the dealer's website to schedule a test drive. Due to the scale of this purchase, a consumer generally takes longer coming to a decision, and utilizes many resources prior to taking one of these actions. Therefore, awareness campaigns do not typically produce the large volume of low-funnel activities expected when compared to make/model page targeting.

The assumption that awareness initiatives aren't effective in helping generate greater consideration of a brand on third-party automotive websites clearly exists in the market today. However, OEM advertisers and their agencies are missing a tremendous opportunity to influence consideration of their brand by not deploying awareness placements on third party sites. In fact, there have been many notable success stories when measuring other important factors to provide a more holistic view of the campaign's results.

Standard OEM KPIs:
Request a quote
Download a brochure
Schedule a test drive
Locate a dealer
Build and price a vehicle

View the Entire Picture to Truly Measure Effectiveness

In evaluating the success of an awareness campaign on third-party automotive sites, it is common for marketers to view the post-click activities that occur on their site once the consumer has clicked on the advertisement. Rather than only taking the post-click activities into account, Jumpstart Automotive Group has been working with advertisers to observe the broader impact these campaigns have on consumer shopping behavior both in content they consume as well as engagement with advertisements once they are deeper in the shopping process. Depending on the placement and the

message, a variety of publisher-side metrics can be measured to determine whether a campaign was successful in increasing interest in a make or model.

Some of these metrics could include: lift in unique users who visited make/model pages, growth in total pageviews pertaining to the model, and an upward trend in average pages viewed per user. The increase in engagement on a make or model page could also lead to greater engagement with ad units while on those pages or on the marketer's website after viewing the advertisement. In this analysis it has been found that an awareness campaign is effective not only in driving consideration for a make or model, but also in driving increased engagement with retention advertisements on those pages. A homepage or category sponsorship may impact a vehicle's share of shopping activity among its competitive set. This variance in share can also indicate success. Lastly, competitive messaging can be effectively monitored by observing competitive cross-shopping and reverse cross-shopping data. All of these trends provide a bigger-picture vision into the success of awareness campaigns.

For example, if we were to measure how effective a Luxury Sedan sponsorship was for the Lexus LS in increasing consideration among luxury sedan shoppers, we would look at both the cross- and reverse cross-shopping data for the LS. This would show the percent of LS shoppers viewing specific competitive vehicles (cross-shopping), and the percent of competitive vehicle shoppers that are viewing the LS (reverse cross-shopping).

The findings shared in this study will demonstrate definitively how effective awareness placements are on third-party auto sites when measuring beyond standard KPIs. It is imperative that OEMs and their agencies begin to incorporate these measures into their media evaluation process moving forward.

Study Goals

1. Provide a holistic view of the value of an awareness campaign by highlighting shopping activity and growth in consideration after exposure to advertisements on a third-party automotive website.
2. Demonstrate that shopping behaviors on a third-party automotive site provide more value and insight to an automotive marketer than measuring only those actions taken post-click.
3. Encourage marketers to use measurement approaches based on the campaign objectives rather than measuring all campaigns equally.

Publisher-side Trends To Measure Impact of Awareness Campaigns:

*Growth in Unique Users
Growth in Pageviews and
Pageviews per User
Change in share of shopping
Cross-shopping and Reverse
Cross-shopping*

Key Findings

After the observation of ten different awareness campaigns across brands that vary from luxury to economy, high to low volume sales, and mainstream versus niche in popularity, we found the following results that indicate there is more to measure than the standard KPI set.

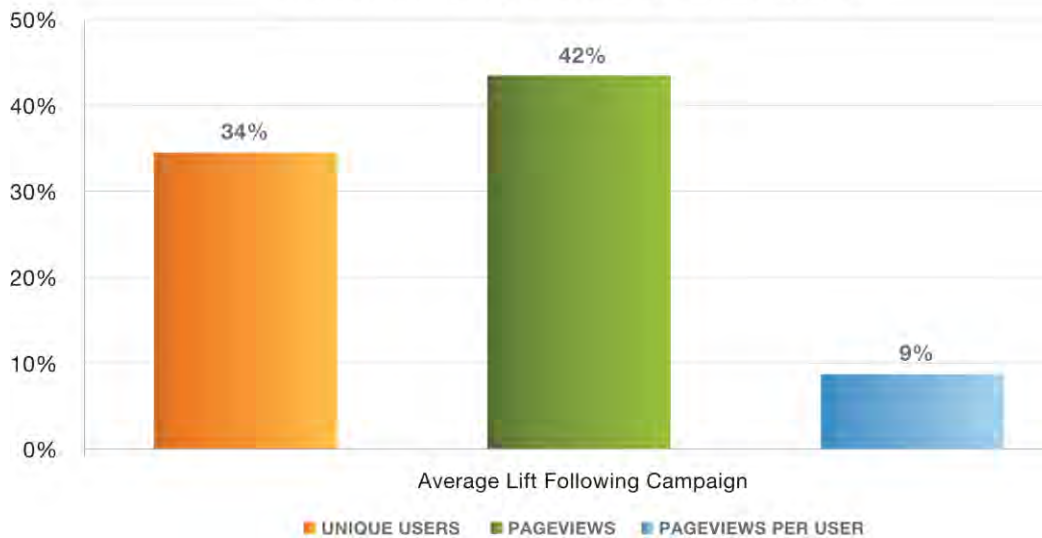
- **Traffic Growth on Make & Model Pages:** Across all campaigns (whether on the homepage, new car entry pages, or on vehicle segment or category pages) we found that there was either an immediate lift in brand traffic or a lift in the month following the awareness campaign.
- **Average Lift in Brand Traffic:** On average, the campaigns measured saw a **34%** lift in Unique Users to the brand's research pages, a **42%** lift in brand Pageviews and a **9%** lift in Pageviews per User directly following the awareness message.
- **Increase in Engagement with Retention Advertisements during Awareness Campaign:** Awareness advertisements not only drove incremental traffic to make and model pages, but also drove higher engagement with retention advertisements. Brands recognized up to **58%** increase in clicks and up to **38%** increase in post-click activities from the retention advertisements.
- **Growth in Share of Shoppers:** The brands running awareness placements saw a substantial gain in share of shoppers within the vehicle segment following the campaign, with an average lift of **52%** from pre-to-post campaign periods.
- **Increase in Consideration among Competitive Shoppers:** Not only were these brands able to increase their share within a vehicle segment, but they also grew consideration at an average of **58%** among shoppers of key competitive brands when looking at reverse cross shopping reports.

Traffic Growth to Brand Make & Model Pages

Time and time again, we see that awareness campaigns have a positive impact on brand consideration. One way to look at this impact is the variance in make or model-specific pages on a third-party automotive site before, during and after an awareness campaign. Not only is it telling to see an increase in Unique Users, but increases in Pageviews and Pageviews per User also exhibit higher levels of interest or engagement with the make/model.

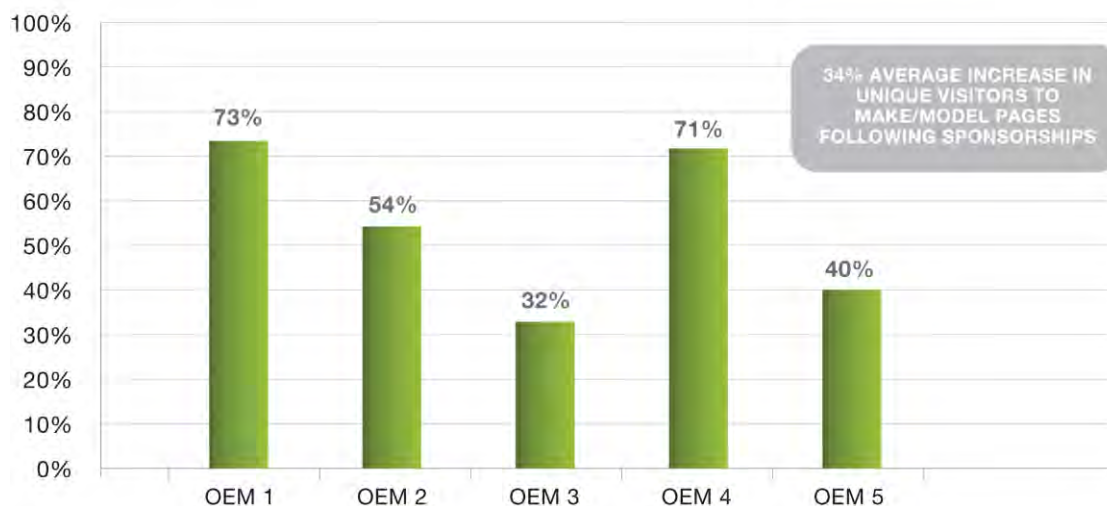
In Table 1.1 below we've observed ten different awareness campaigns from varying brands, models and time periods, and determined that on average, the lift in traffic and usage on brand pages ranged from **9%** to **42%** directly following the campaign. Specific examples of these campaigns and their individual results can be found in the *Creative Appendix* at the end of the study.

TABLE 1.1 AVERAGE BRAND TRAFFIC GROWTH FOLLOWING SPONSORSHIP CAMPAIGNS

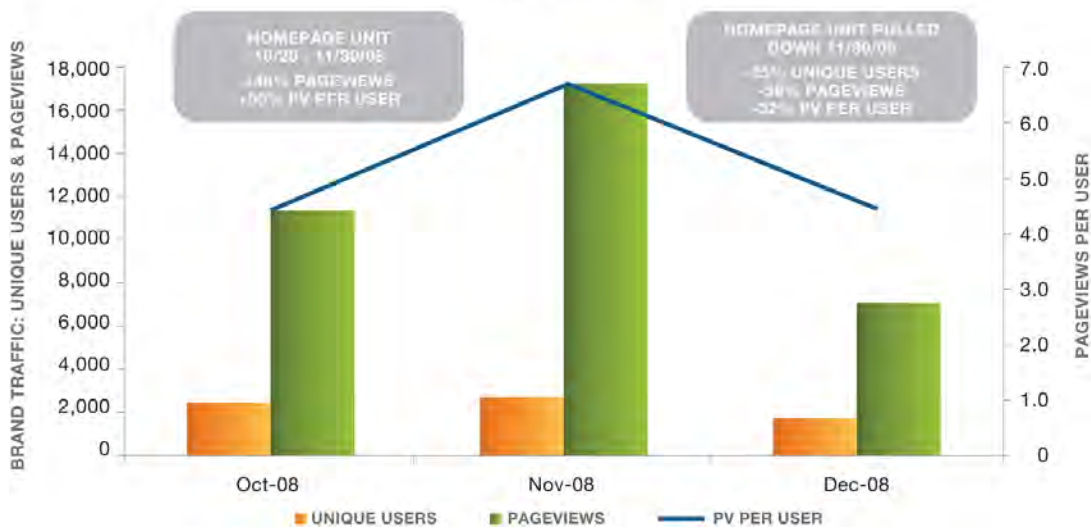


In analyzing all of the brands that utilized category or homepage awareness placements, some were able to achieve growth in unique visitors to their brand pages upwards of 50%. Some examples of individual growth can be seen in Table 1.2 and 1.3 as well as in the *Creative Appendix*.

TABLE 1.2 BRAND SHOPPING GROWTH IN UNIQUE VISITORS FOLLOWING AWARENESS CAMPAIGNS

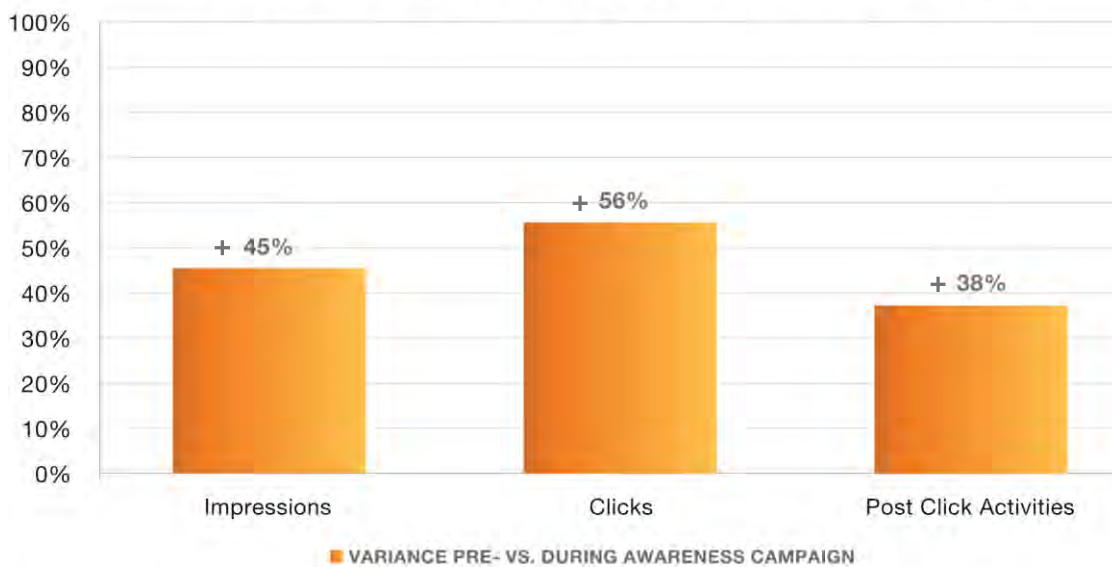


**TABLE 1.3 NICHE BRAND REALIZES TRAFFIC GROWTH FOLLOWING
HOMEPAGE AWARENESS CAMPAIGN
OCTOBER - DECEMBER 2008**



In addition to the increase in brand engagement, it has been recognized that there has been significant impact on engagement levels with advertisements deeper into shopping on make and model pages. Marketers have seen improved performance on their retention campaigns during the period of running an awareness campaign on third-party automotive sites as we see in the brand example in Table 1.4.

**TABLE 1.4 PERFORMANCE OF RETENTION CAMPAIGN
POSITIVELY INFLUENCED BY AWARENESS CAMPAIGN**



By reaching consumers earlier in their shopping/research process, additional consideration can be gained for a vehicle which may not have otherwise been in the consideration set of the shopper. The incremental lift in users who research the brand/vehicle is most often overlooked in the evaluation of awareness campaign success, yet it's typically the most telling metric.

Gaining Share of Shoppers vs. Segment Competitors

Another telling aspect of advertising impact can be found in the variances in share from an advertising period to a dark period. As we see in the examples in Table 2.1, each brand saw significant lift in its share when comparing the pre-advertising period to the post-advertising period. The average lift in share of vehicle segment shoppers, across all brands in this study, was a stunning **52%**.

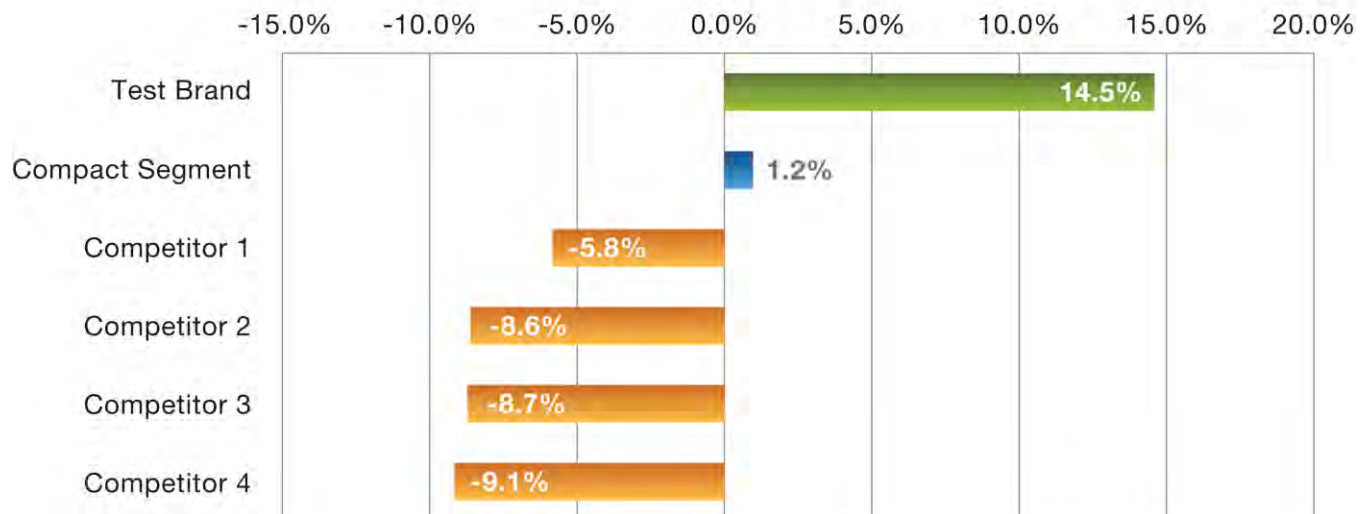
TABLE 2.1 OEM INCREASES IN SHARE OF SEGMENT SHOPPERS FOLLOWING AWARENESS CAMPAIGN



The analysis of high-impact awareness placements showed that gains in consideration by one brand resulted in one or more competitors' loss. The story often unfolds as in the example below in Table 2.2. Our test brand is a low volume compact segment brand, both in sales and shopper consideration. Within its vehicle segment, key competitors are some of the highest volume vehicles and most are mainstream, established brands. The test brand managed to grow its share of segment shoppers,

while during the same period each of its competitors lost consideration, and the category as a whole only saw slight improvement.

TABLE 2.2 VARIANCE IN SHARE OF COMPACT SEGMENT SHOPPERS

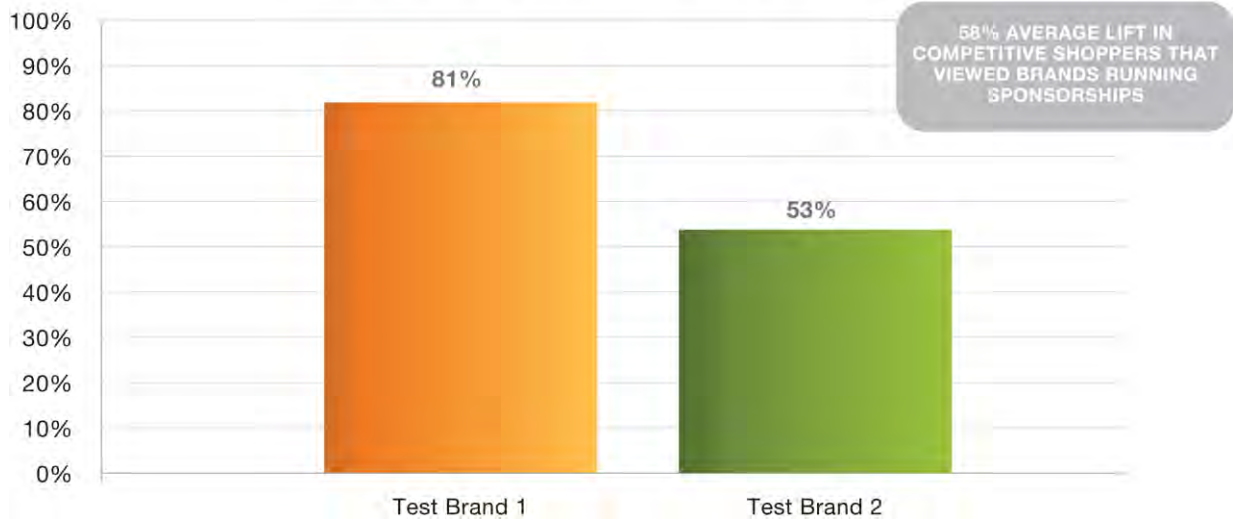


Reverse Cross-Shopping – Key Insight for Growth in Consideration

Similar to variance in share of shopping, publishers are able to provide a deeper understanding of the cross-visitation behaviors when consumers are shopping and researching vehicles. One model’s shoppers may also be looking at vehicles that the manufacturer doesn’t consider a competitor. When it occurs in higher frequency over time, it may cause the manufacturer and the agency to reconsider its competitive set.

The reverse is when competitor shoppers are frequently viewing the model in question, and this too can shed light on the true competitive set for that model. Jumpstart often views reverse cross-shopping data for vehicles that deployed sponsorships and conquest campaigns to gauge the variance in consideration among competitors. The results have been compelling both uncovering which models are cross-shopped most frequently, and how the brand in question has been able to improve consideration among competitors through advertising campaigns. Two remarkable examples are summarized in Table 3.1 where growth in consideration is demonstrated among two test brands that were nearly out of consideration among competitor shoppers until they ran sponsorships and competitive messaging. For each test brand, 5 competitive vehicles were observed to determine the average lift in reverse cross-shopping frequency.

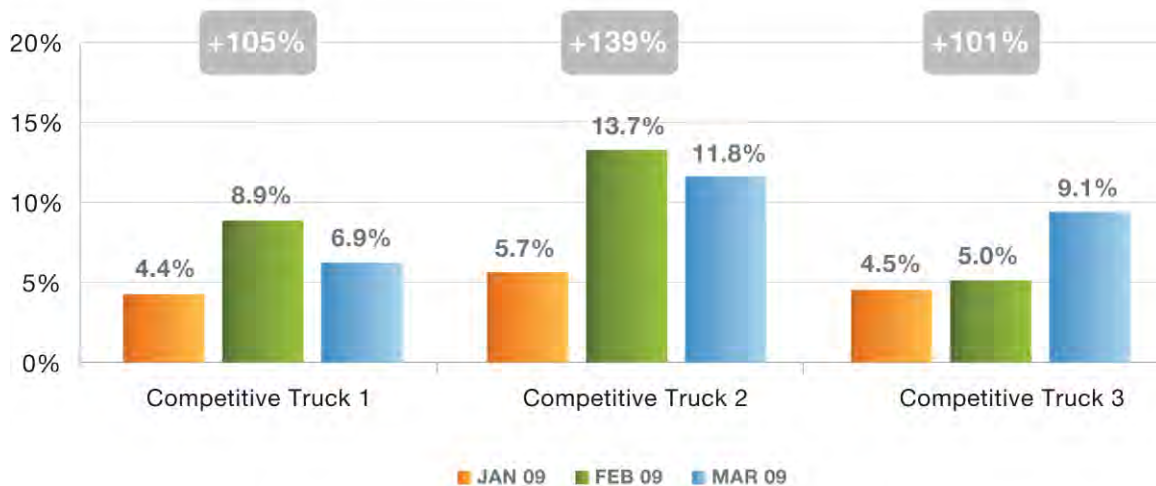
**TABLE 3.1 PERCENT GROWTH IN CONSIDERATION
AMONG KEY COMPETITORS' SHOPPERS**



In just a short period of advertising, both brands were able to move consideration significantly through awareness and segment sponsorships, as well as competitive messaging.

One specific brand example in Table 3.2 demonstrates how a truck brand was able to grow its consideration among shoppers who were researching competitive vehicles. In January, 2009 the test brand ran a truck sponsorship and in February, competitive shoppers researched the test brand up to 139% more than the previous month.

**TABLE 3.2 DOMESTIC TRUCK CONSIDERATION AMONG
COMPETITIVE SHOPPERS - REVERSE CROSS-SHOP**



These examples demonstrate how awareness campaigns provide marketers the opportunity to gain consideration from consumers who are shopping competitive vehicles and the results speak for themselves. A more detailed analysis of cross and reverse cross-shopping can be found in image 1.3 of the *Creative Appendix*.

Summary & Conclusions

This case study outlines new key metrics that must be considered when measuring the success of awareness and category placements on third-party automotive websites. The current KPI approach fails to take a holistic view of brand success by not including these metrics. Publisher partners are able to provide a broader spectrum of automotive shopping activity than standard KPIs. Incorporating these insights can only improve the understanding that automotive advertisers have of the success of a campaign.

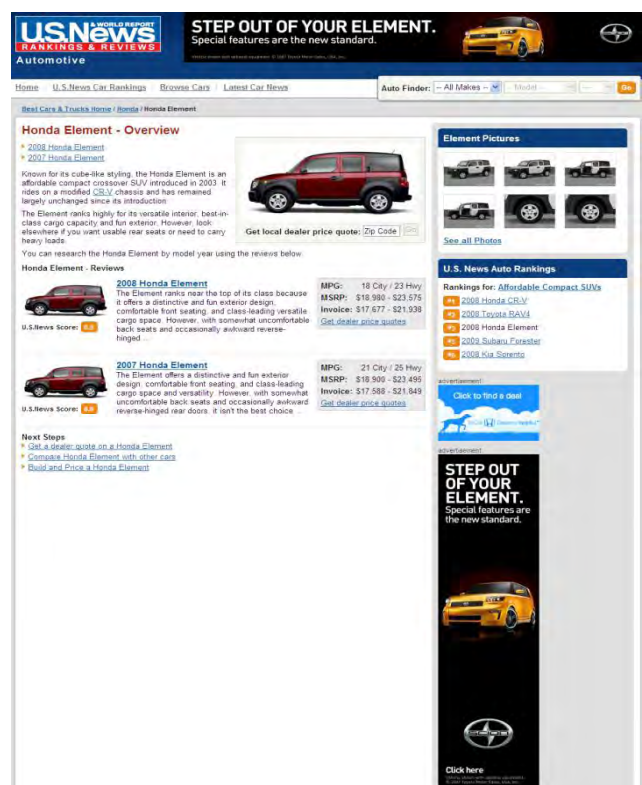
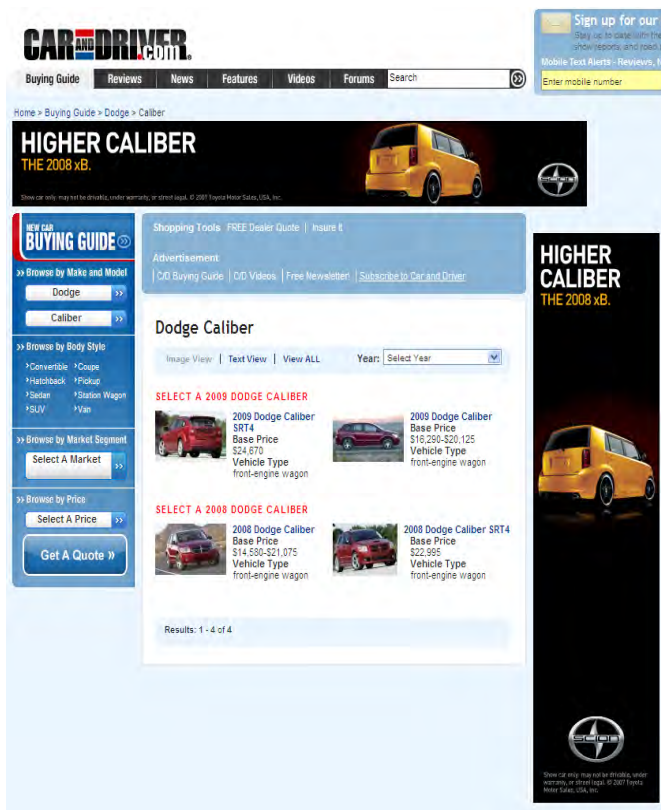
Key Takeaways:

- **Awareness campaigns unquestionably drive traffic growth for brands.**
 - Across all campaigns there was either an immediate lift in brand traffic or a lift in the month following the awareness campaign. On average, the campaigns measured saw a **34%** lift in Unique Users to the brand's research pages, a **42%** lift in brand Pageviews and a **9%** lift in Pageviews per User directly following the awareness message.
- **Brands that placed sponsorships not only recognized growth in traffic, but also growth in share of vehicle shoppers within its segment.**
 - Across all brands tested, an average of **52%** lift in share was achieved following a homepage or category sponsorship.
- **Cross-shopping and reverse cross-shopping data are effective in gauging growth in brand consideration.**
 - Test brands recognized average growth in consideration of **58%** among competitive shoppers.

Creative Appendix

Within the creative appendix, specific examples of category sponsorships and conquering campaigns can be found. This provides a sample of a few of the brands used in this study for which Jumpstart was granted permission. Insights into the publisher success metrics and campaign details are provided for each example.

Image 1.1 & 1.2 Scion Competitive Messaging against Dodge Caliber & Honda Element



Publisher Success Metrics:


- Placement Type: Homepage Masthead and Model-Specific Conquest
- Advertising Message: Brand pricing
- Campaign Flight Dates: 10/20/2008 – 11/30/2008
- Traffic Lift during Campaign: +50% Pageviews & Pageviews per User
- Variance after Campaign: -35% Unique Users, -56% Pageviews, -32% Pageviews per User


Competitive View: Scion saw a 4% lift in traffic in November when five key competitors dropped from 6-16%. During this same period Scion grew anywhere from 14% to 242% in consideration of competitor shoppers based on reverse cross-shopping trends.



Image 1.3 Cross- and Reverse Cross-Shopping Data for Scion & Competitors

	CROSS-SHOPPING			REVERSE CROSS-SHOPPING		
	OCT 08	NOV 08	DEC 08	OCT 08	NOV 08	DEC 08
DODGE CALIBER	2%	1%	2%	8%	20%	7%
HONDA CIVIC	37%	12%	17%	4%	5%	5%
HONDA ELEMENT	4%	1%	3%	9%	8%	11%
TOYOTA YARIS	9%	3%	6%	8%	9%	7%
MAZDA 3	11%	6%	11%	6%	19%	8%

Image 2.1 Subaru Crossover/Wagon Category Sponsorship





All-New 2010 Subaru Outback
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Car Rankings: Affordable Full Size Wagons

Ranking of fullsize wagons, generally priced under \$30,000. Subaru Outback, Mazda MAZDA5 Wagon, Volvo V50 and more. Rankings based on an in-depth analysis by U.S. News editors of all published auto ratings, reviews and test drives.

Ranking List | Sort by Scores

Rank	Model	U.S. News Score
1	2010 Subaru Outback	8.7
2	2009 Volkswagen Passat Wagon	8.4
3	2009 Ford Taurus X	8.3
4	2010 Mazda Mazda5	8.3
5	2010 Volvo V50	8.2
6	2009 Kia Rondo	8.1
7	2009 Saab 9-3 Wagon	7.3

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Publisher Success Metrics:

Placement Type:	Crossover/Wagon Category Sponsorship
Advertising Message:	Vehicle Redesign
Campaign Flight Dates:	October 1, 2009 – October 31, 2009
Traffic Variance:	Unique Users shopping the Subaru Outback increased 24% from September to October, when sponsorship was live.
Share of Shoppers:	Outback's share of Wagon and Crossover shoppers on Jumpstart sites grew 14% during the month of their sponsorship.
Cross Shopping:	Competitors fell in consideration of Outback shoppers, namely Volvo XC70 (-9%) and Volkswagen Passat (-28%).
Reverse Cross Shopping:	Competitive shoppers' consideration of the Outback increased from 6% to 90% from September to October.
Leads Submitted:	Outback's leads submitted by Jumpstart shoppers grew 162% from September to October, while all leads submitted only grew by approximately 2% over that same time period.
Key Takeaways:	Outback was able to reach more shoppers, gain consideration from competitors, increase their share among consumers shopping in the Wagon and Crossover segments, and increase leads during a period of advertising on an upper-funnel page across Jumpstart sites.

In-Market Strategy Appendix

Retention:

The most common practice during the planning season is to first secure media on retention pages, the lowest hanging fruit in the in-market space. A brand's make and model pages on third-party automotive websites are considered to be most valuable as consumers who are on these pages have often narrowed their next vehicle purchase down to an average of three models in their consideration set. The majority of an advertiser's in-market budget secures retention pages across top third-party automotive websites for the year and serves not only the purpose of messaging to consumers lower in the shopping funnel, but also blocking competitive models from being able to advertise here.

Conquest:

Conquest is a competitive form of advertising on third-party automotive websites. The capability exists in two forms. First, if an advertiser doesn't purchase 100% of their make/model inventory, it leaves it open for competitive advertisers. These opportunities are limited due to most OEMs protecting their model pages. The second way in which this can be done is through behavioral targeting, though this technology doesn't exist across all in-market websites. Through cookie data, an advertiser can re-target competitive shoppers with their messaging both on and off the third-party site where the consumer originated. Behavioral targeting provides advertisers greater reach of a very finite audience that may otherwise be limited in the contextual environment.

Segment/Category:

Vehicle category or segment pages are thought of as upper-funnel because the consumer is still in the process of deciding what type of vehicle they're looking at, and have not started narrowing down to specific models in that class. This provides the marketer the opportunity to generate awareness of key features of a vehicle that set them apart from the competition. Because of this, segment sponsorships also allow advertisers to reach shoppers who are looking at their competitors both in a contextual environment and through behavioral targeting.

Awareness:

These opportunities usually consist of entry pages where consumers haven't yet specified what they are shopping for. Most common are third-party automotive sites' homepages or new car research pages that will allow the consumer to begin researching by body style, price, quality ratings, etc. Because consumers aren't always ready to click on an advertisement right when they begin their research, these placements generally deliver a lower response rate and fewer key performance indicators on the marketer's website which is why agencies allocate the least amount of their in-market budgets to awareness opportunities. It is often stated that awareness is being generated

through general news, hobby or lifestyle websites, and through traditional media outlets, therefore it isn't necessary on third-party automotive websites. The moneys that are set aside for awareness placements are typically reserved for new launches or a vehicle redesign that is making its way to market.

Methodology

1. Review multiple traffic trends across Jumpstart Automotive Group publisher websites (average Unique Users, Pageviews and Pageviews per User) in 2008 and 2009 to determine seasonal patterns.
2. Examine multiple brands' traffic trends (average Unique Users, Pageviews and Pageviews per User) across Jumpstart sites for sufficient periods of time prior to and following advertising campaigns to determine variance during advertising flight.
3. Evaluate make/model traffic trends against vehicle segment trends to determine average variance in share of segment shoppers during awareness advertising flight.
4. Compare make/model traffic against key competitors' traffic on Jumpstart sites during awareness campaign.
5. Identify any positive changes in cross- and reverse cross-shopping data as a result of the consideration generated from awareness advertising.

ⁱ Jumpstart Automotive Group Audience Survey, April, 2009

ⁱⁱ Jumpstart Automotive Group Audience Poll, August, 2009



Scion Drives Consideration

Scion was able to increase its presence and consideration among in-market shoppers on Jumpstart sites through high-impact awareness units and competitive conquering

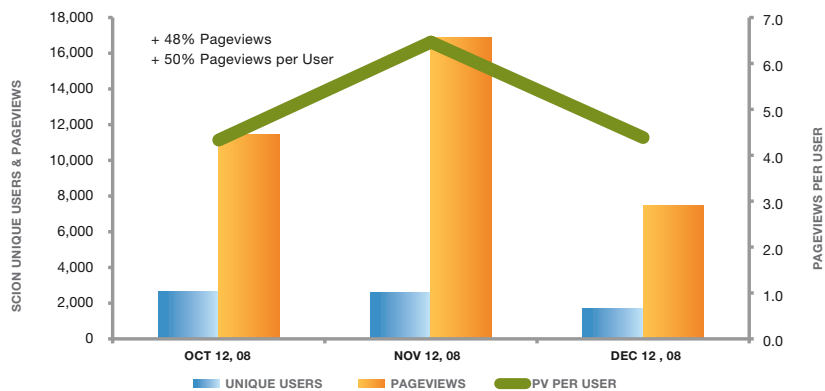
Scion Drives Consideration

Scion was able to increase its presence and consideration among in-market shoppers on Jumpstart sites through high-impact awareness units and competitive conquering.

Key Findings

- **48%** increase in unique users and **50%** increase in Scion pages viewed as a result of a homepage awareness placement (see Graph A)
- **158%** growth in Scion consideration among key competitive shoppers through a direct competitive approach (see Graph B)

GRAPH A - SCION BRAND CONSIDERATION LIFT WITH HOMEPAGE AWARENESS UNIT
OCTOBER - NOVEMBER, 2008



GRAPH B - CROSS AND REVERSE CROSS-SHOPPING FOR SCION BRAND

	CROSS-SHOPPING			REVERSE CROSS-SHOPPING		
	OCT 08	NOV 08	DEC 08	OCT 08	NOV 08	DEC 08
DODGE CALIBER	2%	1%	2%	8%	20%	7%
HONDA CIVIC	37%	12%	17%	4%	5%	5%
HONDA ELEMENT	4%	1%	3%	9%	8%	11%
TOYOTA YARIS	9%	3%	6%	8%	9%	7%
MAZDA 3	11%	6%	11%	6%	19%	8%

Study Objective: Evaluate the impact that the Scion contingency campaigns had on increasing awareness, consideration and purchase intent of the brand compared to competitors on Jumpstart sites.

Methodology: Review Scion brand shopping activity on Jumpstart sites prior to, during and after contingency campaigns; compare Scion activity to key competitors through traffic variance, share of shoppers and competitive cross-shopping.

A complete analysis of this study can be found on www.jumpstartautomotive.com



Case Study: Scion, March 2009

Scion Drives Consideration

Scion was able to increase its presence and consideration among in-market shoppers on Jumpstart sites through high-impact awareness units and competitive conquering.

“Getting the Scion message in front of Jumpstart’s 10 million-plus in-market shoppers delivered tangible results that helped us understand the impact of the different targeting strategies we implemented. Being able to shift consumer shopping patterns and influence their behavior instantaneously with our message is of great value to us.”

- Adrian Si, Interactive Marketing Manager, Scion

Background

Campaigns: Scion Contingency, seasonal events: April 2008 (1 month) and October – December, 2008 (3 months)

The Problem: Scion was not getting the awareness, consideration, and purchase intent they expected when launching important sales events in early 2008. Scion also wasn’t reaching engaged, in-market shoppers across third-party websites. Specifically, their presence among consumers shopping on Jumpstart’s automotive websites was minimal, garnering a historic share of shopping volume of less than 0.5%. They typically only maintained a marketing presence on Jumpstart’s sites to support contingency programs a few times a year.

Jumpstart’s Goals:

- Demonstrate an increase in awareness, consideration and purchase intent of the Scion brand by analyzing positive shopping behavior that occurred as a result of Scion’s shift in presence, messaging and targeting strategy during important sales event periods.
- Prove immediate and lasting value in securing make and model pages on third-party automotive websites by blocking the competition from presenting their message on those pages.
- Demonstrate the value of high-impact homepage units and their affect on brand traffic.
- Recognize the value of conquering with relevant messaging, and identify its impact on consumer shopping patterns.

Scion Objectives and Strategy:

In April 2008, Scion’s goal was to reach near-term Scion shoppers on Scion make/model pages, as well as through category level targeting to Coupe and Sedan shoppers, while also conquering specific competitors like VW Jetta and Mazda 3.

In Q4, Scion’s goal was to drive consideration among the Jumpstart websites with homepage presence and took direct aim at competitors within its category by highlighting features that trumped the competition. Scion decided to secure all inventory on its own make and model pages, blocking other OEMs from conquering its brands from Oct. through Dec.

To help increase its presence and awareness among the Jumpstart shoppers, Scion delivered a homepage Flash Header unit, which gives the advertiser the ability to manipulate the website’s homepage masthead with its own messaging; Scion’s brand traffic increased by 50% when most competitors were losing traffic to their brand/model pages.

In addition, Scion keyed in on competitive model intenders researching the Honda Element and the Dodge Caliber with a Scion xB message. (see Creative Example I and Creative Example II)

Creative Example I. Scion targets the Honda Element on its model pages

Scion directly targeted Honda Element shoppers by purchasing ad space on their vehicle features pages and using creative messaging to speak directly to those consumers.

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Automotive

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Best Cars & Trucks Home / Honda / Honda Element

Honda Element - Overview

- 2008 Honda Element
- 2007 Honda Element

Known for its cube-like styling, the Honda Element is an affordable compact crossover SUV introduced in 2003. It rides on a modified CR-V chassis and has remained largely unchanged since its introduction.

The Element ranks highly for its versatile interior, best-in-class cargo capacity and fun exterior. However, look elsewhere if you want usable rear seats or need to carry heavy loads.

You can research the Honda Element by model year using the reviews below.

Honda Element - Reviews

U.S. News Score: **8.5**

2008 Honda Element
The Element ranks near the top of its class because it offers a distinctive and fun exterior design, comfortable front seating, and class-leading versatile cargo space. However, with somewhat uncomfortable back seats and occasionally awkward reverse-hinged ...

MPG: 18 City / 23 Hwy
MSRP: \$18,980 - \$23,575
Invoice: \$17,677 - \$21,938
[Get dealer price quotes](#)

U.S. News Score: **8.8**

2007 Honda Element
The Element offers a distinctive and fun exterior design, comfortable front seating, and class-leading cargo space and versatility. However, with somewhat uncomfortable back seats and occasionally awkward reverse-hinged rear doors, it isn't the best choice ...

MPG: 21 City / 25 Hwy
MSRP: \$16,900 - \$23,495
Invoice: \$17,588 - \$21,849
[Get dealer price quotes](#)

Next Steps

- Get a dealer quote on a Honda Element
- Compare Honda Element with other cars
- Build and Price a Honda Element

Element Pictures

[See all Photos](#)

U.S. News Auto Rankings

Rankings for: Affordable Compact SUVs

- 2008 Honda CR-V
- 2008 Toyota RAV4
- 2008 Honda Element
- 2008 Subaru Forester
- 2008 Kia Sorento

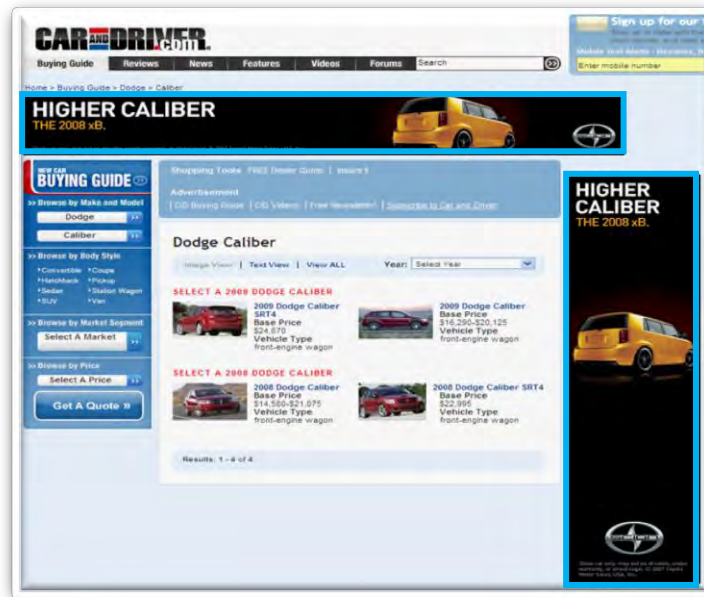
Click to find a deal

STEP OUT OF YOUR ELEMENT.
Special features are the new standard.

Click here

Creative Example II. Conquest messaging on Dodge Caliber pages

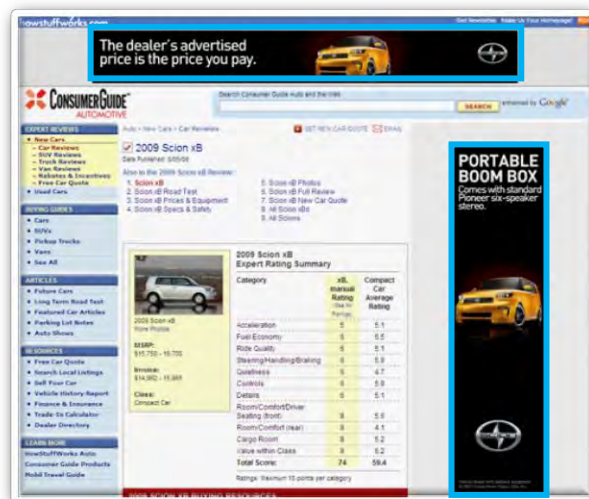
Similar to the Honda Element, Scion used creative messaging on Dodge Caliber model pages within the CarandDriver.com buying guides. Their messaging is working to build consideration for the xB against shoppers that are interested in a similar vehicle within the compact/wagon categories.



Scion's retention placements provided a mix of feature-based and incentive-based messaging. (see Creative Example III)

Creative Example III. Scion supports its model pages with price-point and features messaging

Scion secured its own brand make and model pages with messaging targeted to shoppers who are closer to making a purchase by calling out price incentives or model features that set them apart from their competition.



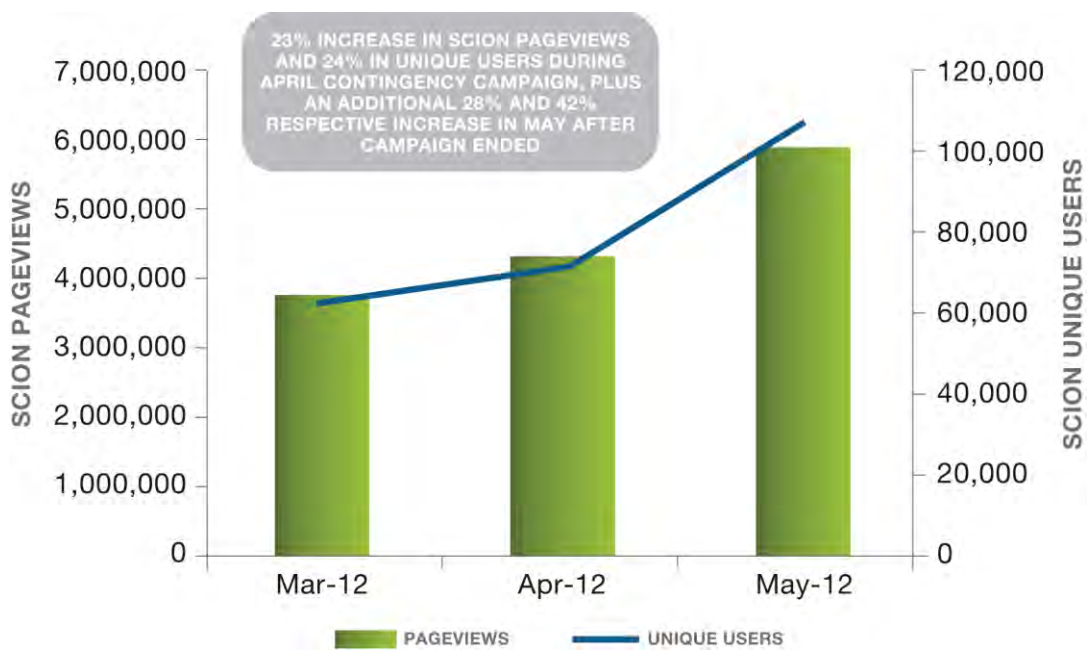
Findings

Highlights

- During Scion’s April contingency campaign, pageviews of brand model pages grew by **23%** and continued into May, increasing by **28%**.
- During November’s contingency campaign, pageviews to Scion brand pages grew by **19%**, while most competitive vehicles lost ground; including the vehicle most cross-shopped by Scion shoppers – Honda Civic (-6%).
- During its October-November Homepage Flash Header, Scion brand pages saw a **48%** increase in unique users and a **50%** increase in Scion pages viewed overall during that time on the site..
- Scion pinpointed Dodge Caliber as a key conquest model, in Q4 2008. Cross shoppers increased by **158%** on their pages.

Scion Brand Traffic: During the April contingency campaign, pageviews to Scion brand model pages grew by **23%**. Unique users to Scion models also improved by **24%**. The Scion message resonated with in-market consumers who had not yet made a decision on a make or model (category targeted), and also increased consideration among researching competing vehicles like VW Jetta and Mazda3. The campaign strategy to target Scion intenders, Coupe and Sedan shoppers, and shoppers on competitive vehicles proved successful. (see Table 1.1)

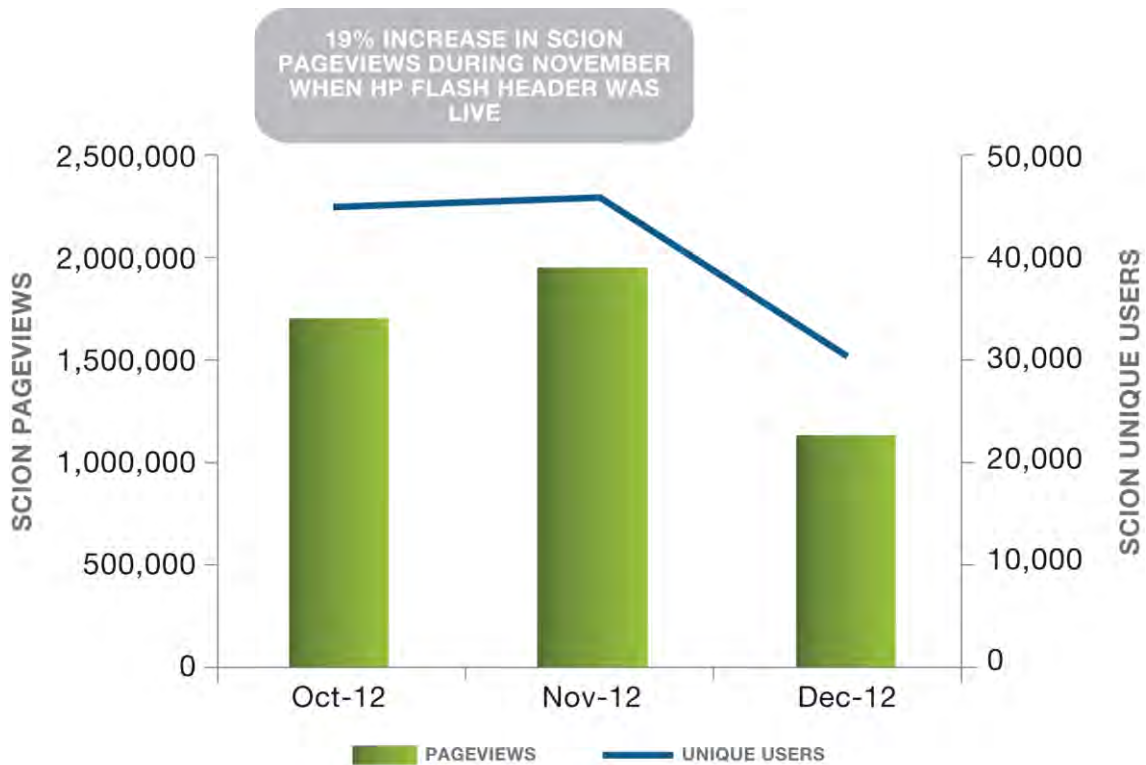
Table 1.1 Scion Brand Traffic Growth (Pageviews & Unique Users) during April Contingency Campaign



In addition, the campaigns impact on Jumpstart’s users had a lasting impression through the month of May, driving their pageviews and unique users up again, this time to **28%** and **42%**. This increase followed the industry trends in larger consumer interest in smaller, more fuel efficient vehicles during the spring of 2008. (see Table 1.1) Another impressive milestone occurred for Scion during an abysmal fourth quarter for car sales, and car shopping traffic. While Jumpstart traffic was down to some of its lowest levels of the year, Scion bucked the trend with pageviews to its model pages increased by **19%**.

This improvement was driven by Scion’s homepage awareness placements and competitive messaging against key vehicles. (see Table 1.2)

Table 1.2 Scion Brand Traffic (Pageviews & Unique Users) on Jumpstart sites during Q4 Contingency Campaign



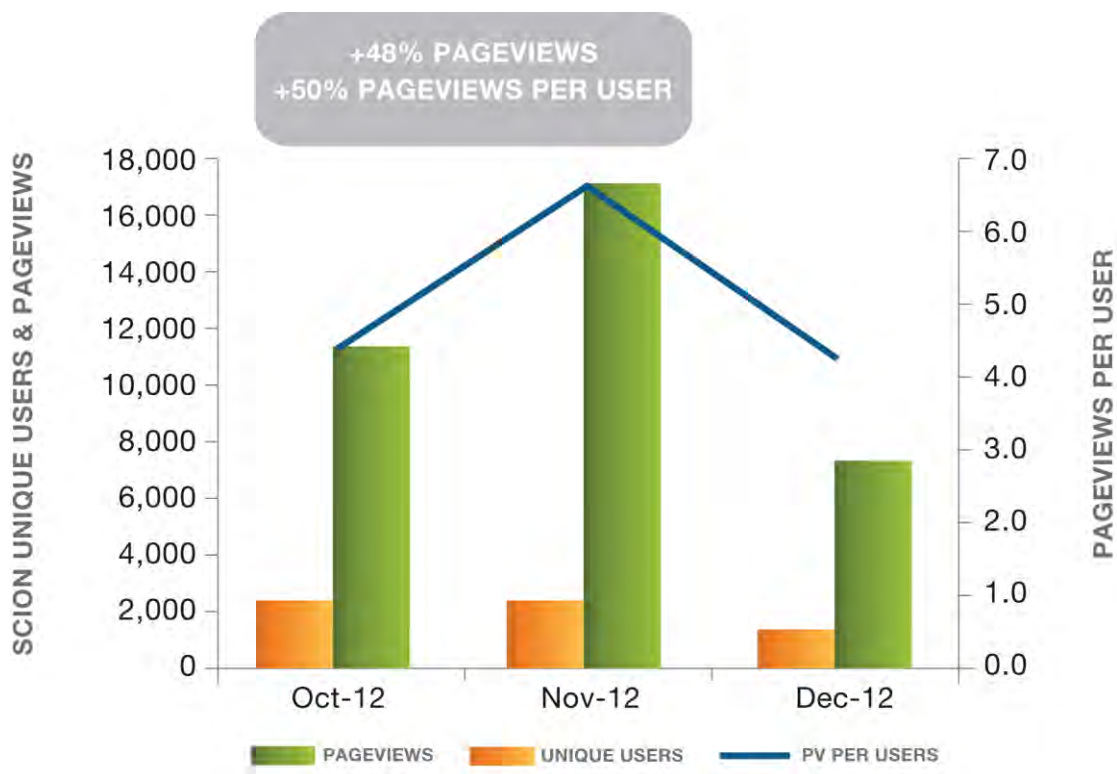
The Impact of Awareness Placements Beyond the Click

The key element of the Q4 contingency campaign was the homepage Flash Header. High-impact placements on third-party automotive sites generally prove valuable beyond the key buying activities that many OEMs measure. They call attention to a vehicle that wasn’t perhaps in a prospective buyer’s consideration set and often drive greater awareness of that vehicle during and after a campaign has completed.

Scion’s Flash Header went live on Oct. 20, 2008 and ran through the end of November. Scion pageviews on the site improved by **48%** while unique users remained flat, demonstrating the increased level of interest by prospective Scion shoppers. User pageviews also grew by a **50%** mark during this time.

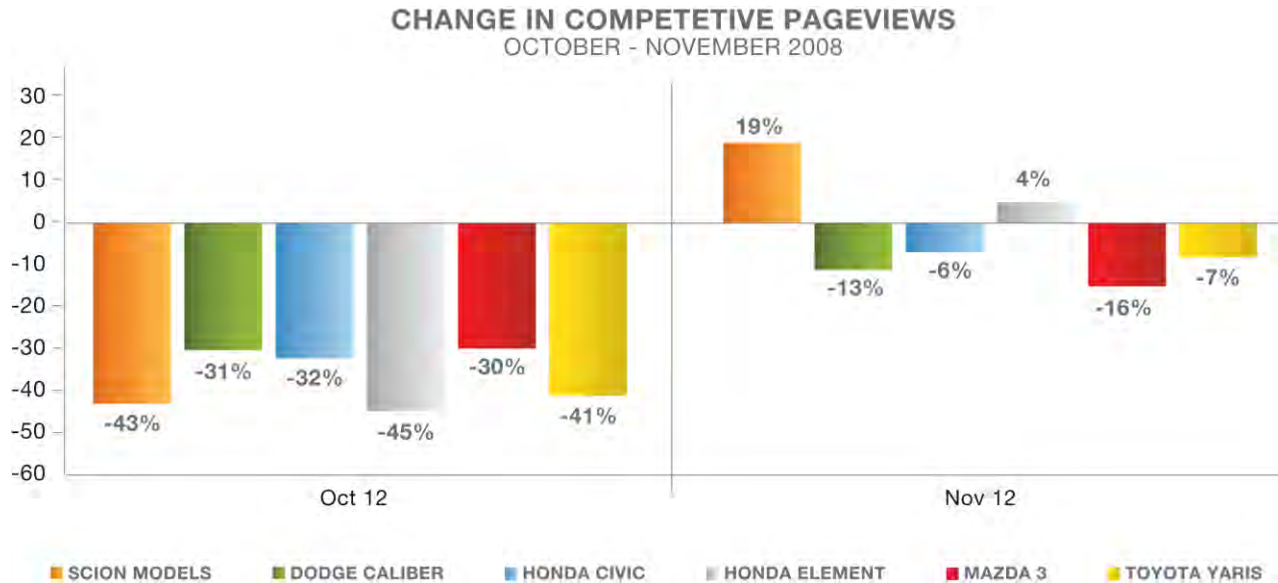
The chart below reflects the impact Scion’s flash header had on shoppers arriving at the third-party automotive site. The chart also reflects the sizeable drop in consideration after the homepage placement run was complete (*note: December marked a dismal month for the auto industry and traffic to Jumpstart’s sites; therefore, a relative diminished impact already existed*).

Table 2.1 Scion traffic following homepage awareness placement October – December, 2008



Improving consideration and purchase intent are standard goals for any advertiser marketing to in-market shoppers. Scion’s increased presence in Q4 allowed a traditionally low volume brand to stand out among the competition and drive greater consideration and purchase intent in the process. As the chart below demonstrates, Scion traffic took a major leap from October to November thanks to their incremental presence. In turn, competing brands suffered in most cases, with only Element seeing a minor increase in consideration. One of the brands that Scion specifically targeted with conquest messaging – Caliber – dropped in consideration by **13%** from October to November.

Table 3.2 Scion competitors' traffic changes from October – November, 2008



Cross-Shopping and Reverse Cross-Shopping Data – Q4, 2008

We often review cross-shopping data to identify key competitors on third-party automotive websites. In Table 4.1 below, we can see the percentages of Scion shoppers who also researched the competitive vehicles listed under the cross-shopping columns. As we would suspect, we saw consideration of the competitive vehicles decrease during the months where Scion ran a high-impact awareness placement and delivered brand/model messaging that highlighted key features that set them apart from their competition.

Table 4.1 Scion Cross-Shopping and Reverse Cross-Shopping Data on Jumpstart Sites

	CROSS-SHOPPING			REVERSE CROSS-SHOPPING		
	OCT 08	NOV 08	DEC 08	OCT 08	NOV 08	DEC 08
DODGE CALIBER	2%	1%	2%	8%	20%	7%
HONDA CIVIC	37%	12%	17%	4%	5%	5%
HONDA ELEMENT	4%	1%	3%	9%	8%	11%
TOYOTA YARIS	9%	3%	6%	8%	9%	7%
MAZDA 3	11%	6%	11%	6%	19%	8%

Even more telling is the reverse cross-shopping data. This tells us the inverse: what percentage of the competitive vehicle shoppers are also looking at Scion. A goal for most manufacturers is to gain consideration among consumers shopping for competitor vehicles and to gain market share.

As we see in Table 4.1 above, Scion consideration among Dodge Caliber shoppers jumped from **8% to 20%** when both the flash header and the competitive ads on Caliber pages were running; representing a **158% lift**. Similarly, **19%** of Mazda 3 shoppers were also looking at Scion in November, when the previous month there was only 6%, which represents a **242%** increase in Scion consideration. Honda Element is the only competitor that didn't increase its Scion shopping during November; instead they increased in December when the awareness placement wasn't running. Scion's Q4 campaign messaging demonstrates an enduring effect between awareness messaging and conquest messaging.

Summary

Scion successfully executed the three most important strategies pertaining to in-market automotive advertising:

- 1) **Awareness sponsorships** that helped call attention to their brand when automotive shoppers first came to an automotive research website;
- 2) **Conquesting** against shoppers that were researching competitive vehicles;
- 3) **Protecting** their own make/model pages with specific price and feature messaging that blocked out competitors from reaching their interested parties.

In addition, correlating these successes to actual shopping behavior as opposed to survey-based data provides an immediate understanding of positive results. Survey questions aren't

being asked after the fact to garner this information; the data reflects activities occurring in real time with the marketing presence.

Awareness sponsorship placements drove a 50% increase in traffic to Scion pages on the third-party automotive site. Although consumers often aren't ready to click on a homepage ad, to leave the site that they just arrived at, it's important to remember that maintaining a presence there holds value beyond the click.

The increase in traffic to Scion pages existed across all Jumpstart sites due to the competitive messaging. Conquesting against specific models and being creative with the message attracted the attention and consideration of shoppers who were looking at vehicles within a specific segment. The most compelling results that support the effectiveness of Scion's conquesting is in the cross-shopping and reverse cross-shopping data, where we saw Scion rise up to 242% in consideration from competitor shoppers.

The data and results throughout this study are powerful, and support Jumpstart's premise that talking to your in-market shoppers with the appropriate targeting and creative messaging is absolutely crucial and proves successful; these strategies are successful and complimentary to each other.

Methodology

1. Review Jumpstart traffic trends (Unique Users & Pageviews) in 2008 to determine seasonal patterns
2. Look at Scion's traffic trends (Unique Users & Pageviews) across Jumpstart sites for full year to determine if there was lift in shopping activity during months of contingency campaigns
3. Review pre-, during and post- homepage awareness placement activity
4. Evaluate Scion's traffic trends against vehicle segment trends (compact car and wagon/crossover) during Q4 contingency campaign
5. Compare Scion's traffic against key competitors' traffic on Jumpstart sites during Q4 contingency campaign
6. Identify any positive changes in reverse cross-shopping data



Toyota Raises Consideration Locally

Southern California Toyota dealer group influences market activity with Jumpstart's in-market program

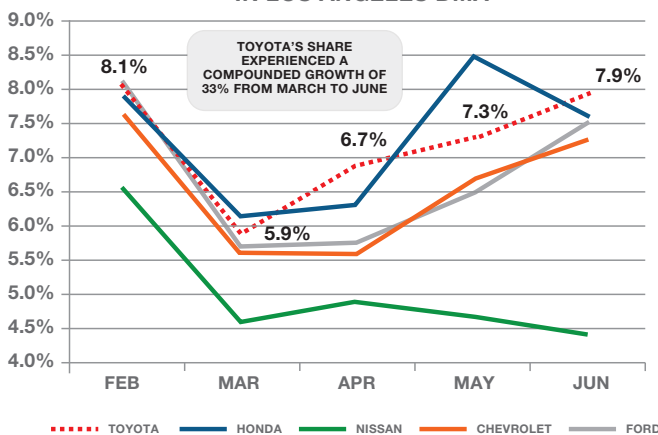
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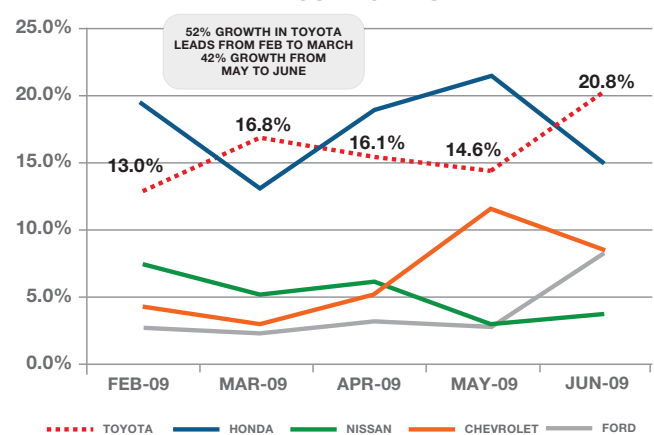
Key Findings

- **33%** growth in Toyota consideration and share of Jumpstart shoppers in the Los Angeles market during its first digital campaign (see Graph A)
- **51%** more in-market shoppers were researching Toyota vehicles in the month following the campaign, when the market only grew by **14%** (see Graph B)
- **60%** average compound growth in Toyota's share of leads submitted on Jumpstart sites while competitors dropped by up to **32%** during the campaign period

**GRAPH A - SHARE OF SHOPPERS
IN LOS ANGELES DMA**



**GRAPH B - SHARE OF LEADS
IN LOS ANGELES DMA**



Study Objective: Demonstrate the direct impact on vehicle shopping and market share within a region that can be achieved with an effectively placed in-market program.

Methodology: Evaluate Toyota brand traffic and share of shoppers in the Los Angeles DMA over six-month period to determine the impact of advertising as it compares to the overall market, and competitors in the market.

Case Study: June 2009

Toyota Raises Consideration Locally

Southern California Toyota dealer group influences market activity with Jumpstart's in-market program.

Background

In the automotive industry, Tier II – otherwise known as Regional Dealer Associations (RDA) – has only just begun its quest to understand and incorporate digital media effectively into its marketing mix. When an RDA goes to market with a media program, it's traditionally a cooperative effort between the dealers that exist in the regional market and representatives from the manufacturer. These efforts are often times funded cooperatively by both the dealers and the OEM. Historically these funds were used to promote the dealer associations through local cable, newspaper and radio media outlets. Only recently has the Tier II assembly embarked on efforts in the digital medium.

Jumpstart Automotive Group has worked with hundreds of RDAs over the past two-plus years to encourage and influence the utilization of digital media, specifically digital media geared toward in-market auto shoppers. We've devised and executed over 300 Tier II digital media programs for RDAs from Ford, Honda, Toyota, General Motors, Chrysler and numerous others.

Toyota's Southern California (Los Angeles) Dealer Association recently piloted its first digital display media program with Jumpstart and a variety of other digital partners. Jumpstart followed the performance of the Toyota brand in the Los Angeles market to understand and report on the impact that this pilot in-market campaign had on auto shopping behavior and consideration. While the agencies involved were measuring actions that existed solely on the Toyota dealer association website, we focused on the nearly half a million shoppers per month in the Los Angeles DMA that browsed Jumpstart's properties. The results are documented in the study that follows.

Study Objectives

- To demonstrate the direct impact on vehicle shopping and market share within a region that can be achieved with an effectively placed in-market program, which effectively influences consideration and purchase intent.
- To prove that online in-market media is an excellent alternative to typical traditional media outlets utilized by Tier II advertisers.

Campaign Details

The Toyota Southern California Dealer Association, with the help of its agencies Davis Ellen and Saatchi & Saatchi, launched the campaign in mid-February of 2009, and continued through the middle of May. The Jumpstart media program of nearly three million impressions included a mix of Toyota make and model page targeting, category-relevant behavioral targeting, and general media targeted to the Southern California market.

Highlights of Results

Toyota's consideration in the Los Angeles DMA improved markedly from March through June:

- **51%** more in-market shoppers were researching Toyotas into the month following the campaign (the L.A. market overall grew by only 14%)
- **41%** more Toyota pages were viewed by in-market shoppers during the same period
- Toyota's share of shoppers in the market increased by as much as **33%**
- From Feb. through June, Toyota's share of leads submitted on Jumpstart's sites in the Southern California market increased by a compound average of **60%**, while Honda and Nissan's share tumbled, down 24% and 32%, respectively.
 - Toyota maintained the highest share of leads among key competitors in March and June in the L.A. market

Toyota's Consideration Experienced a Major Boost During Its Online Campaign with Jumpstart: We first examined the number of shoppers in the market that considered Toyota on Jumpstart's properties and how that grew during the course of the campaign, as well as the level of engagement those shoppers had with Toyota's brand pages. As is shown in Table 1.1, Toyota's consideration was stable in the month of February (the campaign began in the 2nd half of Feb.), but began to fall in March during a tough automotive market. The regional association's continued online presence in the market improved consideration throughout the course of the campaign, growing shoppers by 19% from March to April (12% more engagement), and climbing to its highest point in May with a lift of 32% in shopping from March and up 16% in engagement.

The message and presence of Toyota's dealer association marketing also had a lasting effect on Jumpstart shoppers, as Toyota's consideration continued to grow in the L.A. market into the month of June (the campaign ended in the back half of May), growing by 14% in shoppers and 22% in engagement. The compound growth of shoppers and engagement during and after this program (from March through June) was in effect 51% and 41%, respectively, while

shoppers in the L.A. market grew only 14% during the same period and engagement only 10%. This consistent, positive growth demonstrates the effectiveness of simply maintaining a presence on Jumpstart’s properties and the direct impact it has on the way people shop for cars in a given market. (See Tables 1.1 and 1.2)

Table 1.1: Toyota’s growth in consideration in the L.A. market

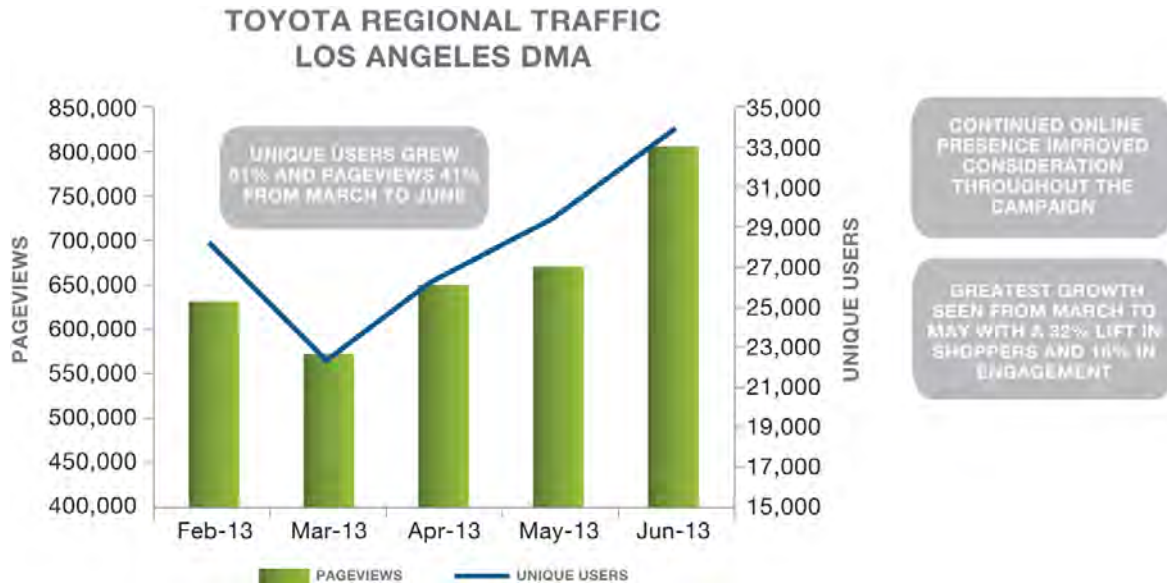


Table 1.2: Toyota’s growth in L.A. vs. the entire market



*Shopping Demand Index represents a collection of data points including users, usage, and pages viewed

Toyota Consistently Captured Shopping Share and Improved its Competitive Position in the Market Throughout the Program:

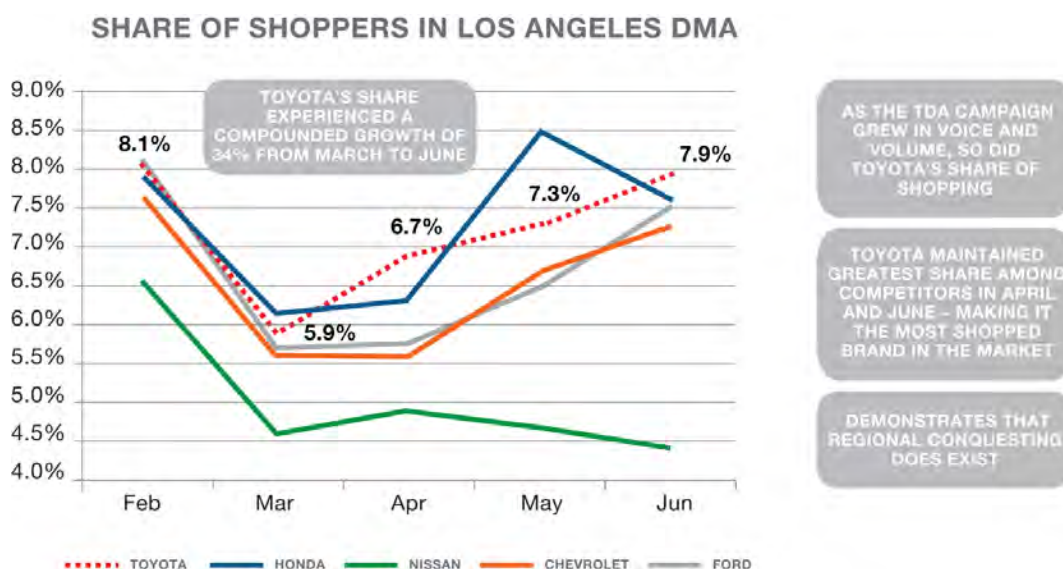
We analyzed the share of shopping activity that took place on Jumpstart’s sites throughout the campaign and into the month following it. After a strong February (8.1% share), Toyota’s (and many of their competitors’) share fell in the month of March to 5.9%, as the auto industry was feeling the effects of the depressed economy, Which made new car shopping a low priority for consumers.

While Toyota’s share in Feb. was at its highest point in this analysis, Toyota remained second to Honda during that month. But as the Southern California dealer association’s campaign grew in voice and volume, so did Toyota’s share and rank, as it climbed into the No. 1 position in the L.A. market in April, increasing its share by 13% (Honda’s share grew by only 3% in this period while the remaining competitors stayed flat).

Toyota’s campaign impact was felt yet again in May, when its share went up to 7.3% (despite falling back to 2nd behind Honda), marking a 9% lift from April to May. The lasting effect of the campaign was demonstrated in June, as Toyota’s share jumped to 7.9%, good for another 8% lift, shooting back up to the top spot in the market and its widest gap. During the same period Honda’s share in L.A. dropped by 10%. Throughout the campaign, Nissan’s share began a precipitous fall in the L.A. market on Jumpstart’s properties, which could partially be attributed to Toyota’s online presence with Jumpstart.

Overall, Toyota’s share of shopping in the market was highly favorable during and shortly after their digital campaign with Jumpstart, netting a compound growth of 34% through June, emphasizing the conquering opportunity that online media presents even at the regional level. Toyota was able to steer consumers’ consideration from other manufacturers by messaging an in-market audience in what’s already a very saturated dealer market. (See Table 2.1)

Table 2.1: Toyota’s growth in share of shopping and competitive rank in the L.A. market



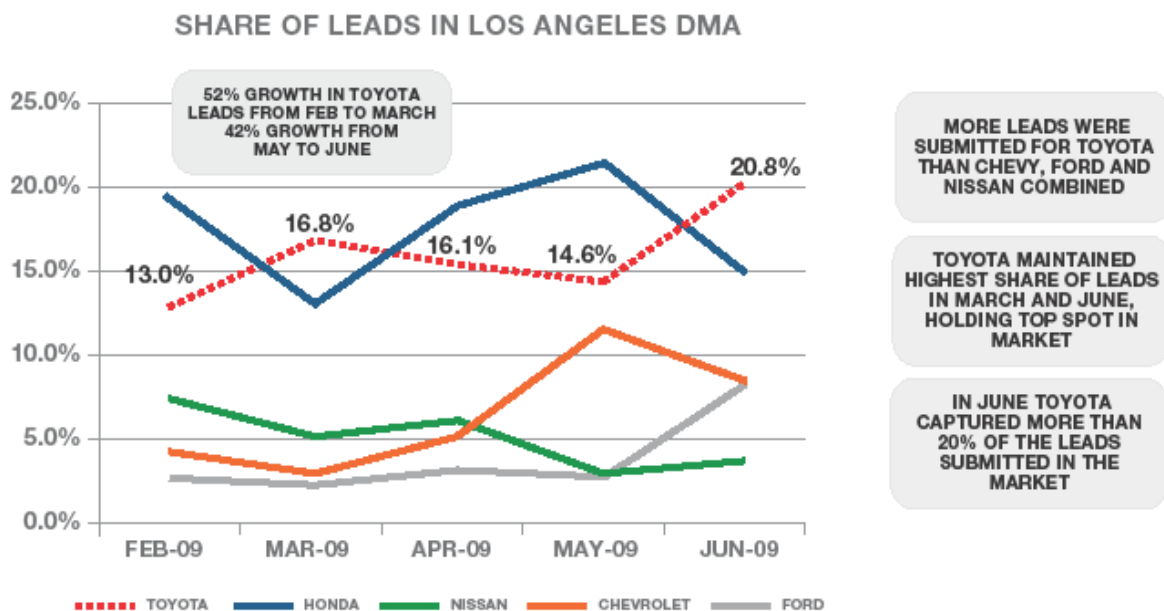
Online Campaign Drove L.A. In-Market Shoppers To Submit A Greater Share of Toyota Leads: When analyzing the lead submissions for the Toyota brand, the online campaign with Jumpstart demonstrated a direct impact on consumers’ decision at the very bottom of the funnel. In fact, more consumers in the Southern California region submitted request-a-quote leads on Jumpstart’s properties for Toyota than Chevy, Ford and Nissan combined during the period of analysis.

The low-funnel impact continued when examining Toyota’s growth in share of leads throughout the program in the L.A. market. Toyota possessed the highest share in March and June, with clear leadership in June thanks to ownership of over 20% of the market’s leads. This was a true testament to the lasting effect of its online campaign with Jumpstart. In this example, Jumpstart shoppers had been exposed to the Toyota brand for the months leading up to June, and furthered their shopping path by requesting quotes at a higher rate in June than any other competitor.

In sheer volume, Toyota’s leads grew by 52% from Feb. to March, and then by 42% from May to June, for a total compound growth of 29%. This established growth in the lowest funnel activity that can be achieved online further proves the value of Toyota’s online campaign with Jumpstart in the L.A. market. (See Table 3.1).

More consumers in the Southern California region submitted request-a-quote leads for Toyota than Chevy, Ford & Nissan combined.

Table 3.1: Toyota’s growth in share of leads throughout the campaign



Online Presence in the Market May Have Impacted Toyota’s Share of Vehicle Sales

Following the Southern California TDA’s First Digital Display Campaign: Though vehicle sales cannot be directly attributed to online advertising for the purpose of this analysis, it is interesting to note the activity that occurred in the Los Angeles market during this time period and shortly thereafter. Using Polk industry sales data, we have identified vehicle sales among Toyota and key competitors in the Los Angeles market from pre-campaign periods to post-campaign. With sales often lagging thirty-plus days from when online shopping occurs, we included July sales in the data set to account for the lag after the June 30 campaign end date. Table 4.1 below demonstrates how Toyota’s share grew nearly 7.5% from pre-campaign (February) to post-campaign (July) levels. Over the same period, Honda’s share of vehicle sales in Los Angeles dropped nearly 7% and Nissan remained flat.

Table 4.1: Toyota’s Share of Vehicle Sales in Los Angeles Grows Ahead of Competitors and the Market

BRAND SHARE IN LOS ANGELES	FEB 09	JUL 09	% VARIANCE
TOYOTA	21.7%	23.3%	7.4%
HONDA	14.5%	13.5%	-6.9%
NISSAN	6.5%	6.5%	0.0%

Summary

The findings from this study demonstrate that the impact of a regional campaign on Jumpstart’s properties goes well beyond clicks, post-event activities or proprietary leads – **in-market shopping patterns are also strongly influenced.**

The measures uncovered here prove that there is significant value in reaching in-market shoppers regionally that other mediums cannot deliver.