

JumpStart Insights

2010–2011

Data and Intelligence to Make Better
Business Decisions in 2012



Insights

2010–2011

About Strategic Insights



The Strategic Insights and Analytics department at Jumpstart Automotive Group provides automotive industry data analysis and market intelligence. Audience behaviors and campaign data are used to understand the automotive shopping process on third-party websites and how advertising influences consumer shopping and interest. Outside of standard audience trending reports, Insights produces case studies and industry white papers to better inform marketing decisions and share best practices among agencies and automotive clients.

In 2011, Jumpstart launched True Market Impact™ (TMI), a proprietary metric that helps advertisers better understand audience and product perceptions. TMI helps prove advertiser performance by measuring consideration, brand engagement, competitive share of market, market demand and purchase intent together. By utilizing this game-changing method, Jumpstart helps advertisers understand their audience and product perceptions to create more precise marketing solutions.

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Section 1:

Digital Audience

1.1 Who is Shopping on Jumpstart Sites?



- 65 percent of Jumpstart shoppers are between the ages of 36 and 64 with a 51/46 percent male/female split, 3 percent who preferred not to answer.

58% of consumers on Jumpstart sites are researching the purchase of a new/used vehicle, with 35% expecting to purchase in the next two months and nearly 60% looking to purchase in the next six months.

- 35 percent of shoppers anticipate a purchase price between \$15,000 to 25,000, while 19 percent expect to pay a minimum of \$25,000.
- 36 percent of shoppers are utilizing two to three automotive resource websites in their purchase process, while nearly 58 percent use between two to six sites.
- 46 percent are using manufacturer websites and of those, 17 percent state that they use them very frequently and 30 percent frequently.
- 32 percent of shoppers are now using automotive blogs in their research process, with only 16 percent stating frequent or very frequent use and 43 percent stating rare or occasional use.

- 36 percent also use forums or communities as part of their automotive research process, with 21 percent stating frequent or very frequent use and 45 percent stating rare or occasional use.
- 47 percent use dealership websites, with nearly 45 percent stating frequent or very frequent use.
- When looking at CarandDriver.com and RoadandTrack.com, nine in ten panelists agree they consider themselves enthusiasts and people often ask their advice when it comes to cars¹.
- 63 percent of shoppers agree that price is a primary concern when purchasing a new vehicle.
- Nearly 60 percent of shoppers agree that they usually stick to a brand that they trust.
- 68 percent state that they always have the latest tech gadgets, showing high composition of early adopters.
- The majority of shoppers (66 percent) do not do their own automotive repairs, however nearly 60 percent state that they enjoy other home DIY projects.

33% of shoppers either completely or somewhat agreed that people come to them for automotive advice, showing a significant audience of influencers.

- 67 percent of CarandDriver.com reader panelists and 74 percent of RoadandTrack.com reader panelists have stated that they enjoy working on their cars².

Source: Jumpstart's Audience Profile Survey, November 2010, except where noted

1. Car and Driver, Road & Track Online Reader Panel Profiles, July 2010

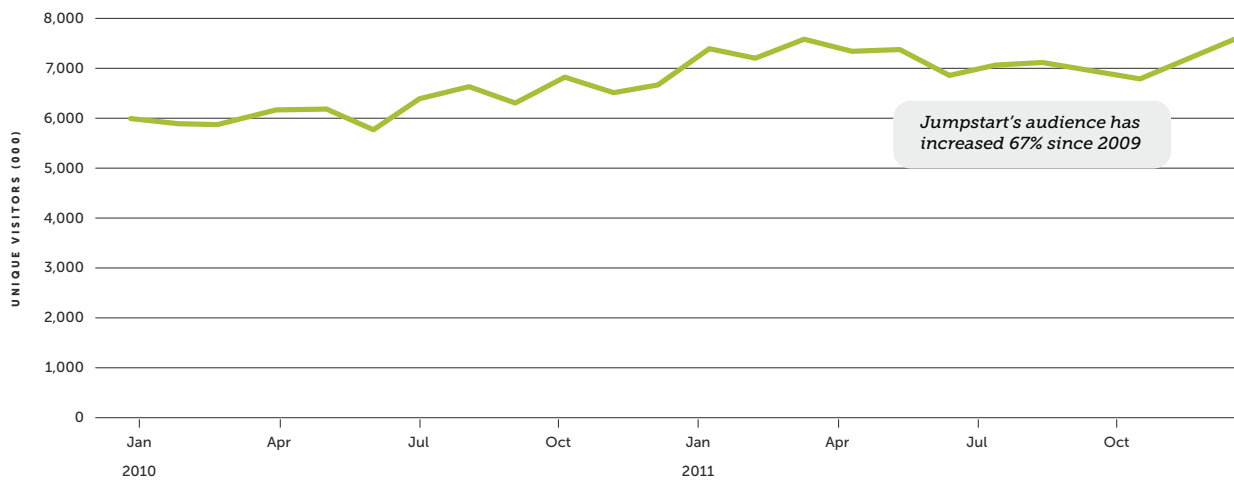
2. Auto Aftermarket Survey, Car and Driver, Road & Track Online Reader Panel, October 2010

1.2 Jumpstart Sites vs. Top Automotive Resource Competitors¹

FIGURE 1.2.1

Jumpstart Unique Visitors

January 2010–December 2011



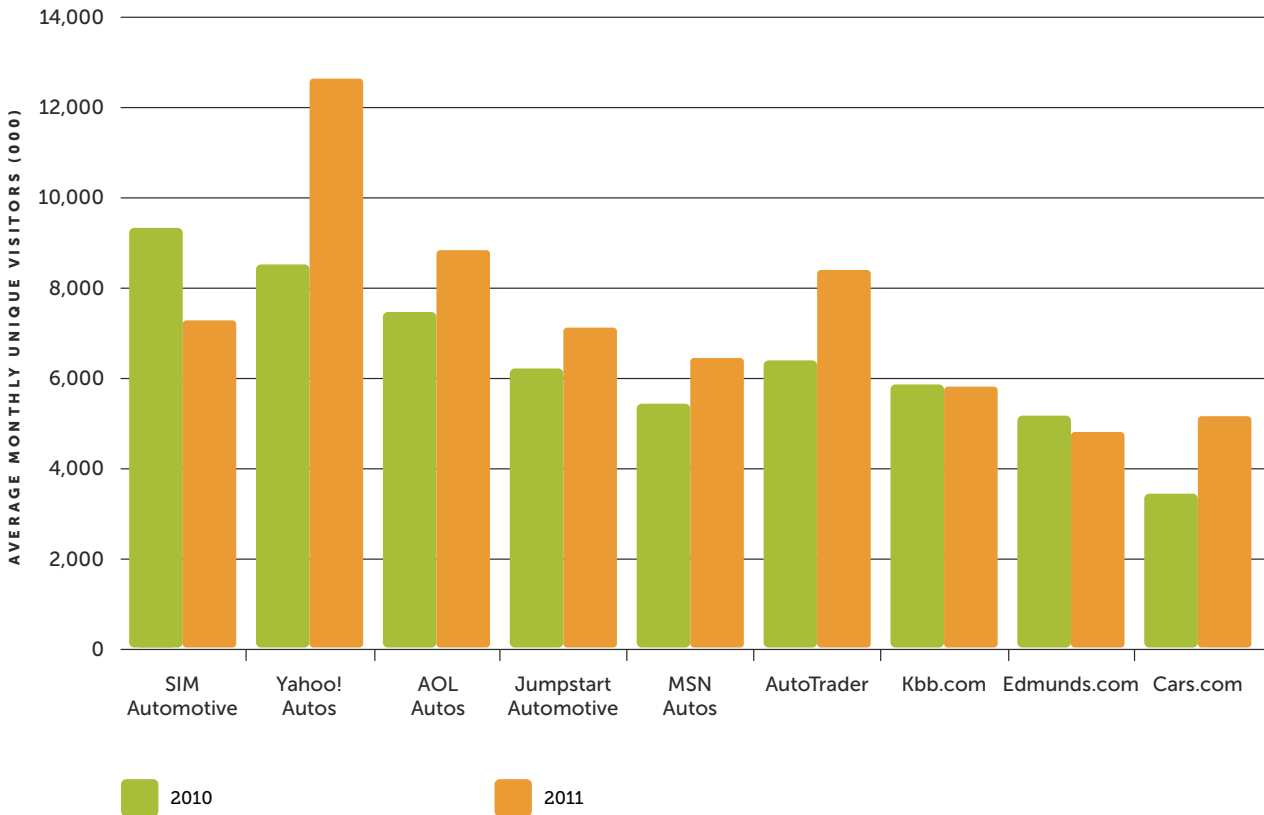
Jumpstart's audience has grown at an average monthly rate of 3% from 2010 to 2011

Source: comScore MediaMetrix, December 2011

FIGURE 1.2.2

Top Automotive Resource Websites Average Monthly Unique Visitor

January 2010–December 2011



Source: comScore, December 2011

FIGURE 1.2.3

Percent of Cross-Visitation Among Top Automotive Resource Websites

December 2011

Media in Rows	TOTAL Audience (000)	Yahoo! Autos	AOL Autos	Auto-Trader	Jump-start Auto	MSN Autos	SIM Auto	Edmunds	Kbb	Cars
Yahoo! Autos	12,148	100	13.4	16.7	20.0	10.7	16.1	19.6	17.5	20.1
AOL Autos	8,100	8.9	100	10.1	14.5	8.0	11.8	13.8	12.2	14.4
AutoTrader	7,608	10.4	9.5	100	25.0	10.7	17.2	23.5	27.5	31.6
Jumpstart Automotive	7,599	12.5	13.6	24.9	100	13.7	28.6	29.3	24.9	28.0
MSN Autos	6,212	5.5	6.2	8.7	11.2	100	7.2	9.6	7.4	6.8
SIM Automotive	5,758	7.6	8.4	13.0	21.6	6.6	100	22.6	15.1	18.5
Edmunds.com	5,159	8.3	8.8	15.9	19.9	8.0	20.2	100	26.1	24.5
Kbb.com	4,834	7.0	7.3	17.4	15.8	5.8	12.7	24.5	100	24.1
Cars.com	4,683	7.8	8.3	19.5	17.3	6.4	15.1	22.3	23.3	100

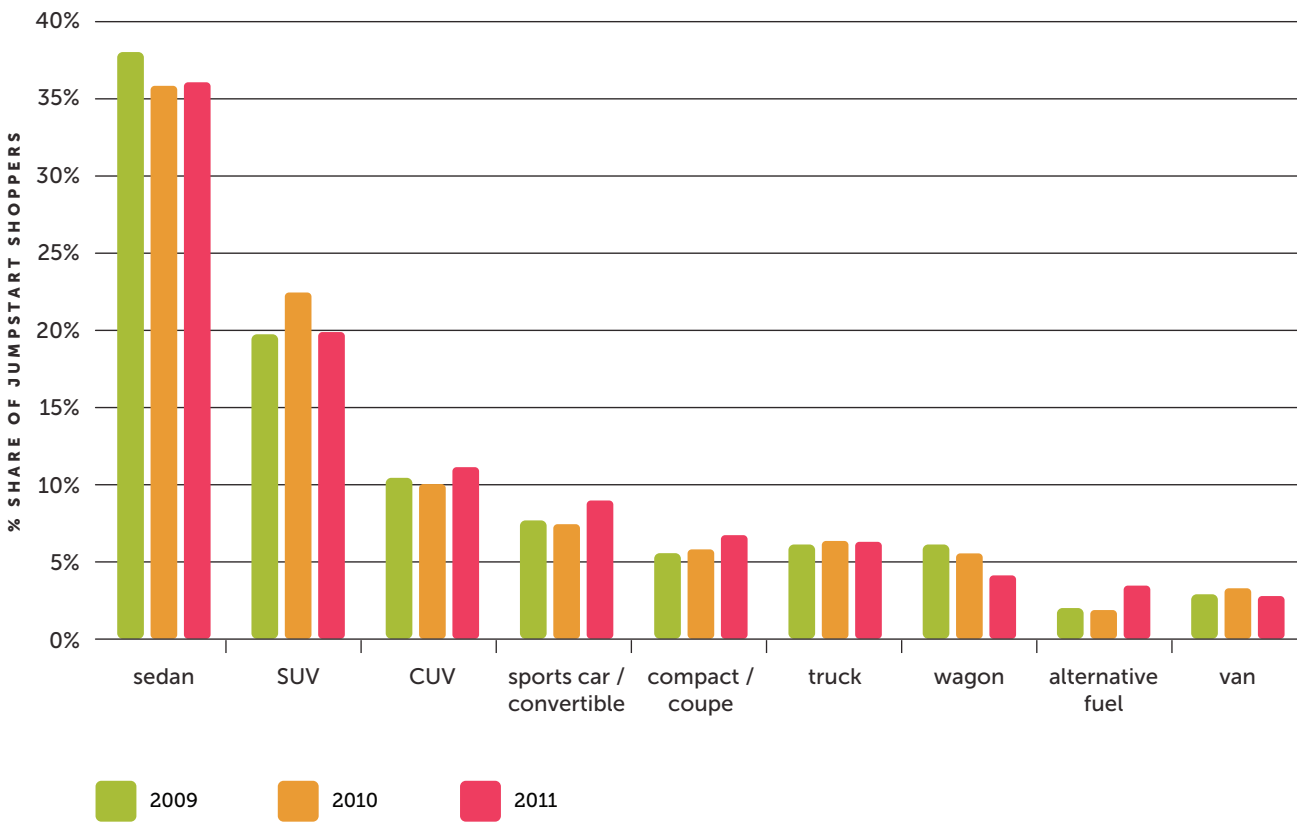
Jumpstart audience shows high duplication with Source Interlink mainly due to enthusiast titles Car and Driver and Road & Track having similar audience to Motor Trend and Automobile.

Source: comScore, December 2011

FIGURE 1.2.4

Share of Shopping by Vehicle Categories

January 2009–December 2011



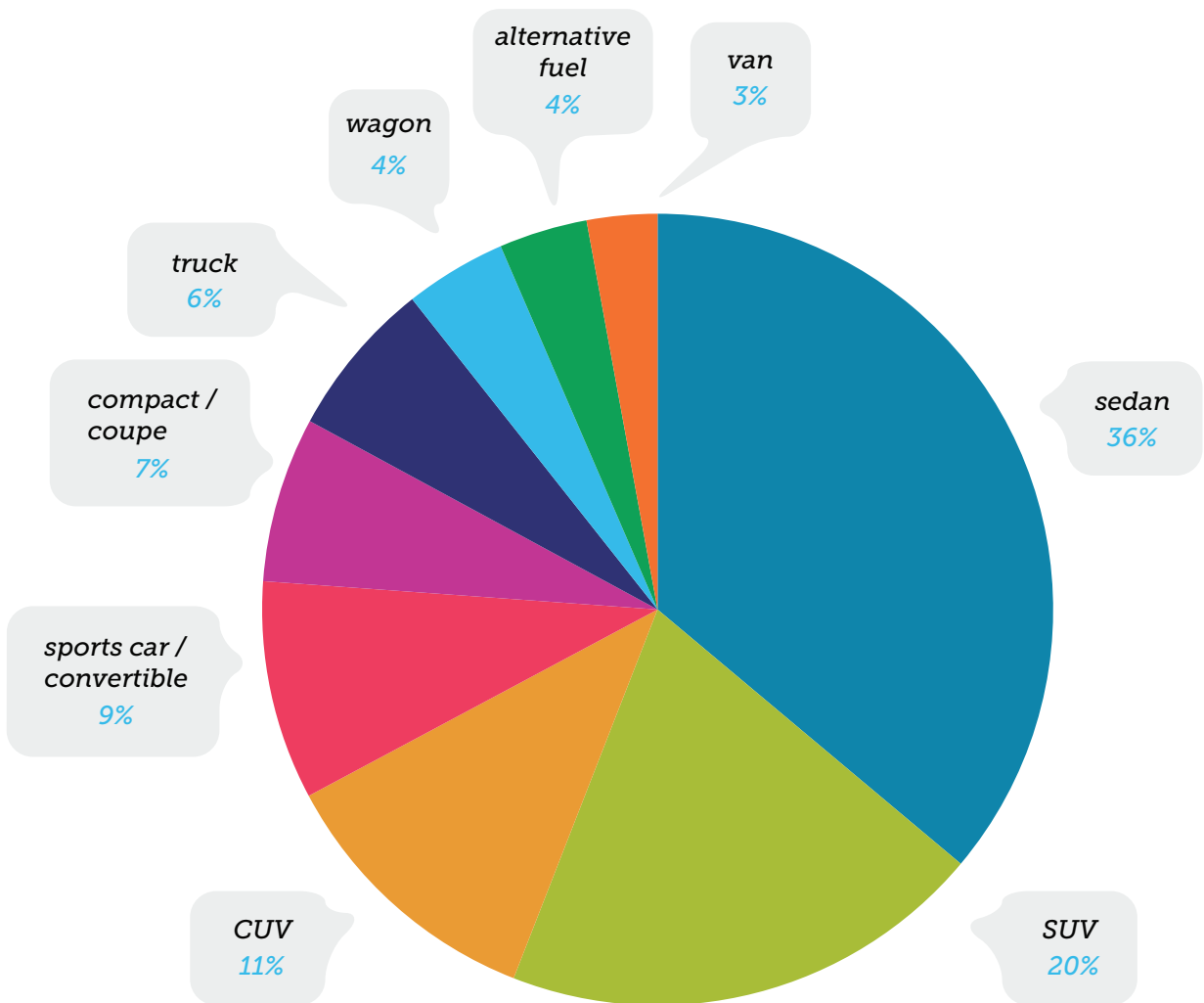
Source: Jumpstart Audience Analytics, January 2012

1.3 In-Market Audience Trends on Jumpstart Sites

FIGURE 1.3.1

Most Researched Vehicle Categories and Sub-Categories

January 2010–December 2011



Sedan Breakdown



In 2010 the overall sedan segment across Jumpstart sites was down 7 percent in shopper interest compared to 2009 and down 10 percent from 2008. The overall segment leveled out in 2011, remaining flat compared to 2010.

Much of the loss from the sedan segment has moved over to crossover utility vehicles (CUV), sports utility vehicles (SUV) and even a small portion to alternative fuel vehicles as many of the most popular sedans offer a hybrid version.

Some major contenders coming out of 2011 are the Hyundai Sonata and Elantra

Among the top vehicles leading the standard segment are common high volume vehicles such as the Honda Accord, Honda Civic and Toyota Camry. Chevrolet's long-standing Impala continues to be a contender, while its Malibu didn't make the list.

Climbing up the list in 2011 were the Hyundai Sonata and Elantra. Sonata jumped 64 percent in share within the sedan segment from 2009 to 2010, jumping up seven spots in the rankings. Its growth from 2008 is even greater at 104 percent. Elantra saw 23 percent growth from 2009 to 2010 but saw even more significant growth in 2011, jumping 47 percent and claiming nearly 5 percent share of the category.

Under the luxury sedan classification, BMW still holds an impressive lead with over 11 percent share of the segment with the 3-Series, creating the largest gap among top competitors in the category. The Acura TL and Audi A4, both of which have been top three contenders since 2008, are still a minimum of three share points behind the 3-Series.

FIGURE 1.3.2

Top Sedans: Share of Segment

January 2009–December 2011

Make	Model	2009	2010	2011
Honda	Civic	8.2%	7.5%	7.7%
Honda	Accord	8.6%	7.7%	7.3%
Ford	Focus	4.5%	4.5%	6.4%
Toyota	Camry	6.7%	6.3%	5.9%
Chevrolet	Impala	7.1%	6.1%	5.8%
Hyundai	Elantra	2.6%	3.2%	4.7%
Hyundai	Sonata	2.5%	4.1%	4.4%
Nissan	Altima	5.1%	5.1%	4.2%
Ford	Fusion	3.3%	2.9%	3.9%
Mazda	3	3.2%	3.3%	3.7%

FIGURE 1.3.3

Top Luxury Sedans: Share of Segment

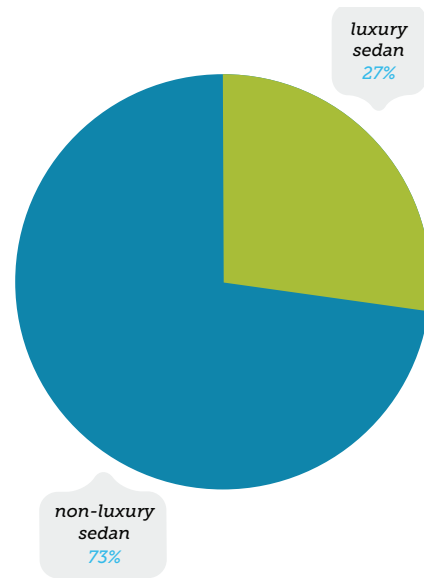
January 2009–December 2011

Make	Model	2009	2010	2011
BMW	3-Series	12.5%	11.2%	11.3%
Acura	TL	7.3%	7.6%	7.8%
Audi	A4	8.9%	9.4%	7.4%
Cadillac	CTS	8.8%	5.7%	6.4%
BMW	5-Series	5.5%	4.8%	4.8%
Audi	A6	3.8%	4.0%	4.5%
Acura	TSX	3.9%	3.6%	4.2%
Mercedes	C-Class	3.5%	3.3%	3.6%
Volvo	S60	2.5%	2.7%	3.3%
Mercedes	E-Class	5.4%	3.1%	2.9%

FIGURE 1.3.4

Share of Shopping: Sedan; Luxury vs. Non-Luxury

January 2009–December 2011



SUV Breakdown



Although the belief has been that SUVs are losing share due to growth within the more fuel efficient crossover segment, there is still shopper interest and demand out there for vehicles in this category.

In fact, the category grew 11 percent from 2009 and 14 percent from 2008. Despite a drop in shopper interested share in 2011, the segment is still being driven by some of the smaller, more fuel efficient vehicles.

Three of the top five SUVs for the past three years are smaller models, with Ford Escape and Honda CR-V remaining neck in neck in the top three. At 9.6 and 7.1 percent share of the category, these vehicles have seen growth ranging from 27 to 48 percent from 2010.

Both Jeep Wrangler and the redesigned Grand Cherokee saw significant growth since 2009 (30 and 67 percent, respectively), but the comparison of their growth since 2008 (52 percent for the Wrangler and 237 percent for the Grand Cherokee) really shows marked improvement in the brand, including enhanced quality of product and marketing efforts since the automaker emerged from bankruptcy.

On the luxury side, slight growth has also been realized among the luxury SUV segment, with a 3.5 percent increase compared to 2009 and a 27 percent increase compared to 2008.

With relatively steady gas prices over the past two years, consumers have continued shopping for larger, luxurious gas guzzlers such as the Cadillac Escalade, Porsche Cayenne and Lincoln Navigator. The Lexus RX tops the category holding nearly 18 percent share (28 percent growth from 2010 and 29 percent growth from 2009), moving ahead of the Escalade for the first time ever.

FIGURE 1.3.5

Top SUVs: Share of Segment

January 2009–December 2011

Make	Model	2009	2010	2011
Ford	Escape	7.4%	6.5%	9.6%
Ford	Explorer	7.1%	6.5%	9.6%
Honda	CR-V	7.4%	5.6%	7.1%
Toyota	Rav4	6.4%	5.5%	6.2%
Jeep	Wrangler	4.3%	5.6%	5.8%
Kia	Sportage	2.3%	2.9%	4.8%
Toyota	Highlander	4.9%	4.4%	4.7%
Jeep	Grand Cherokee	2.9%	4.8%	4.2%
Subaru	Forester	3.4%	3.3%	3.9%
Honda	Pilot	3.2%	3.4%	3.5%

FIGURE 1.3.6

Top Luxury: SUVs Share of Segment

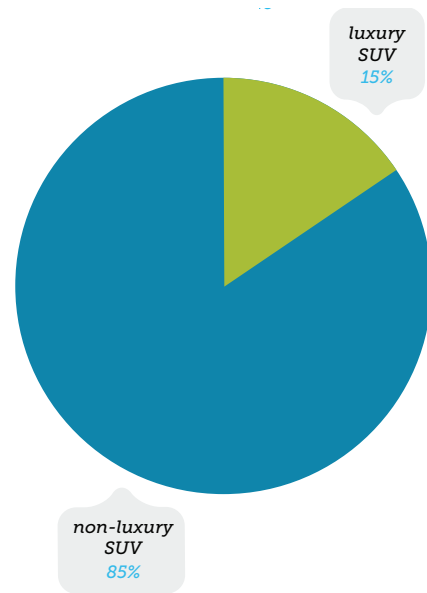
January 2009–December 2011

Make	Model	2009	2010	2011
Lexus	RX	13.6%	13.8%	17.6%
Cadillac	Escalade	15.5%	12.5%	11.2%
Porsche	Cayenne	8.7%	8.6%	11.0%
Infiniti	FX	7.3%	6.6%	8.0%
Volvo	XC90	7.6%	8.5%	7.3%
Land Rover	Range Rover	4.8%	4.7%	6.9%
Lincoln	Navigator	8.1%	7.5%	5.4%
Infiniti	QX	0.1%	3.3%	5.0%
Volvo	XC70	4.2%	3.0%	2.8%
Lexus	GX	3.1%	2.6%	2.8%

FIGURE 1.3.7

Share of Shopping: SUV; Luxury vs. Non-Luxury

January 2009–December 2011



CUV Breakdown



The CUV category continued to see significant growth, with a 36 percent increase from 2009 and a 46 percent increase from 2008 when the segment was still fairly new. CUVs have been successful in moving consumers out of the sedan, wagon and van segments, and largely serve as a family vehicle. In 2011 the luxury CUV classification was nearly at 60 percent the size of the non-luxury class.

The CUV category continues to see growth of 36% from 2009 and 46% from 2008.

Among the standard CUV vehicles, the Chevrolet Equinox leads for the third consecutive year, and although it is a popular, well established vehicle, it saw some new contenders in 2011. Among the most significant growth in the segment were the Hyundai Tucson and the Dodge Journey. From 2009 to 2011, the Tucson jumped 171 percent and Journey increased 565 percent in share of the CUV segment. Other significant increases were seen among the Hyundai Santa Fe and Jeep Compass, with 20 and 66 percent growth, respectively. With Ford's continued growth and success in product quality and marketing, the Edge is expected to continue to compete with the Equinox and Tucson in the top five.

The luxury CUV segment saw 28 percent growth over 2010, and some interesting shifts in top vehicles over the past three years. The Acura MDX and Buick Enclave, which led the segment since 2009, have been bumped by the Audi Q5, which has seen over 200 percent growth compared to 2010. Audi's larger CUV, the Q7 has also seen nearly 28 percent growth since 2009. The Infiniti EX is another one to watch for, at 4.3 percent share of segment in 2011, and less than 1 percent in 2009.

FIGURE 1.3.8

Top CUVs: Share of Segment

January 2009–December 2011

Make	Model	2009	2010	2011
Chevrolet	Equinox	11.7%	13.6%	14.4%
Hyundai	Santa Fe	8.0%	7.2%	9.6%
Hyundai	Tucson	3.3%	8.1%	9.0%
Ford	Edge	7.9%	8.8%	8.3%
GMC	Acadia	7.0%	7.7%	6.5%
Nissan	Murano	8.4%	8.2%	6.1%
Honda	Element	4.7%	3.5%	4.3%
Dodge	Journey	0.6%	3.6%	3.9%
Jeep	Compass	2.1%	2.0%	3.4%
Mazda	CX-7	4.5%	4.0%	3.3%

FIGURE 1.3.9

Top Luxury CUVs: Share of Segment

January 2009–December 2011

Make	Model	2009	2010	2011
Audi	Q5	1.4%	5.8%	19.6%
Acura	MDX	19.6%	15.9%	13.9%
Buick	Enclave	10.4%	16.0%	12.7%
BMW	X5	9.7%	12.9%	7.8%
Cadillac	SRX	9.0%	8.7%	6.7%
Audi	Q7	5.1%	5.8%	6.5%
BMW	X3	5.4%	7.8%	6.4%
Lincoln	MKX	4.0%	5.7%	4.7%
Infiniti	EX	0.2%	2.3%	4.3%
Mercedes	M-Class	4.7%	5.3%	4.0%

FIGURE 1.3.10

Share of Shopping: Sedan; Luxury vs. Non-Luxury

January 2009–December 2011

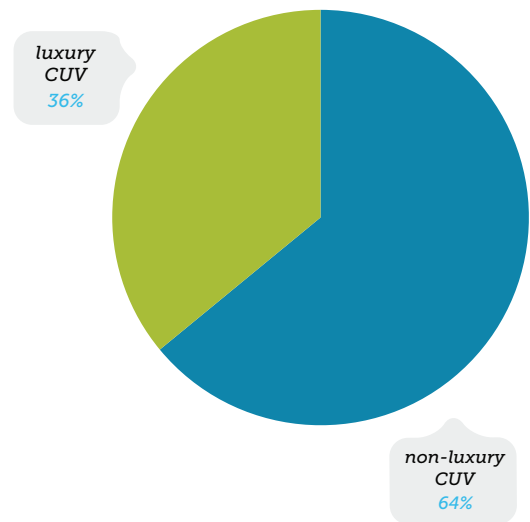


FIGURE 1.3.11

Share of Brand Shopping

January 2009–December 2011

Make	CY 2009	CY 2010	% Var.	Share-Point Var.	CY 2011	% Var.	Share-Point Var.
Acura	2.3%	2.1%	-7%	-0.17%	2.1%	-1%	-0.01%
Audi	3.1%	3.1%	-1%	-0.04%	4.0%	29%	0.91%
BMW	3.2%	3.0%	-7%	-0.24%	2.8%	-6%	-0.18%
Buick	0.8%	1.1%	32%	0.27%	1.2%	7%	0.07%
Cadillac	2.0%	1.5%	-23%	-0.45%	1.4%	-4%	-0.07%
Chevrolet	10.8%	10.8%	0%	0.00%	10.5%	-3%	-0.28%
Chrysler	1.7%	1.7%	3%	0.05%	1.2%	-32%	-0.57%
Dodge	3.4%	4.1%	19%	0.64%	3.7%	-9%	-0.36%
Fiat	0.0%	0.0%	0%	0.00%	0.4%	19962%	0.38%
Ford	12.5%	12.0%	-5%	-0.57%	13.9%	16%	1.93%
GMC	2.3%	3.0%	33%	0.75%	1.7%	-43%	-1.31%
Honda	8.4%	7.9%	-5%	-0.44%	8.4%	6%	0.49%
Hyundai	3.1%	4.1%	34%	1.02%	5.0%	23%	0.95%
Infiniti	0.8%	1.0%	34%	0.26%	1.1%	7%	0.08%
Jaguar	0.4%	0.3%	-24%	-0.10%	0.5%	60%	0.19%
Jeep	2.3%	3.1%	38%	0.86%	2.6%	-16%	-0.51%
Kia	2.0%	2.5%	27%	0.53%	3.2%	27%	0.67%
Land Rover	0.3%	0.3%	5%	0.01%	0.4%	27%	0.08%
Lexus	1.5%	1.7%	16%	0.24%	1.8%	4%	0.06%
Lincoln	0.8%	0.9%	8%	0.06%	0.8%	-6%	-0.05%
Mazda	2.5%	2.6%	7%	0.16%	2.7%	4%	0.11%
Mercedes-Benz	3.9%	1.4%	-64%	-2.47%	1.7%	23%	0.32%
Mini	0.4%	0.5%	24%	0.09%	0.9%	84%	0.39%
Mitsubishi	1.8%	1.8%	-1%	-0.02%	1.5%	-18%	-0.33%
Nissan	6.4%	6.6%	3%	0.22%	5.5%	-16%	-1.08%
Porsche	1.0%	1.1%	8%	0.08%	1.2%	11%	0.12%
Ram	0.4%	0.8%	94%	0.39%	0.4%	-51%	-0.41%
Saab	0.3%	0.3%	-6%	-0.02%	0.2%	-20%	-0.06%
Scion	0.5%	0.6%	17%	0.08%	0.5%	-8%	-0.04%
Smart	0.1%	0.0%	-30%	-0.02%	0.1%	79%	0.04%
Subaru	2.0%	2.2%	13%	0.25%	2.1%	-8%	-0.19%
Suzuki	0.4%	0.6%	36%	0.16%	0.6%	-3%	-0.02%
Toyota	11.3%	11.0%	-3%	-0.35%	10.1%	-8%	-0.91%
Volkswagen	3.4%	2.9%	-14%	-0.47%	3.2%	10%	0.30%
Volvo	1.5%	1.6%	4%	0.06%	1.3%	-14%	-0.22%

FIGURE 1.3.12

Top Models in Share of Shoppers

January 2009–December 2011

Rank	Make	Model	2009 Avg.	Rank	Make	Model	2010 Avg.	Rank	Make	Model	2011 Avg.
1	Honda	Accord	2.29%	1	Honda	Accord	2.03%	1	Ford	Mustang	2.59%
2	Honda	Civic	2.21%	2	Honda	Civic	1.97%	2	Honda	Civic	2.05%
3	Ford	Mustang	2.12%	3	Ford	Mustang	1.94%	3	Honda	Accord	1.92%
4	Ford	F-150	2.04%	4	Ford	F-150	1.72%	4	Ford	Focus	1.71%
5	Chevrolet	Impala	1.96%	5	Toyota	Camry	1.70%	5	Ford	Escape	1.61%
6	Toyota	Camry	1.87%	6	Chevrolet	Impala	1.63%	6	Ford	Explorer	1.61%
7	Chevrolet	Silverado	1.66%	7	Chevrolet	Silverado	1.39%	7	Toyota	Camry	1.58%
8	BMW	3-Series	1.43%	8	Nissan	Altima	1.36%	8	Chevrolet	Impala	1.52%
9	Nissan	Altima	1.42%	9	Toyota	Corolla	1.29%	9	Toyota	Prius	1.48%
10	Toyota	Corolla	1.41%	10	Ford	Explorer	1.28%	10	Ford	F-150	1.33%

Section 2:

Case Studies and White Papers

2.1 Impact Regional Purchase Intent

In-Market Digital Media Significantly Shifts Local and Regional Purchase Intent

OVERVIEW

Industry Problem

Tier II and Tier III are just beginning to scratch the surface in digital media and are unsure about how effective their marketing efforts have been in the in-market space.

Findings

By advertising on third-party automotive sites:

- Studied brands grew their share of shopping by an average of 23 percent during the campaign and 6 percent the month following.
- Vehicle make traffic grew an average of 12 percent during the in-market campaign and 19 percent the month following.
- Studied Tier III dealer groups increased shopping demand 31 to 56 percent for the vehicles they sell after they began advertising on third-party automotive sites.

Overall Takeaway

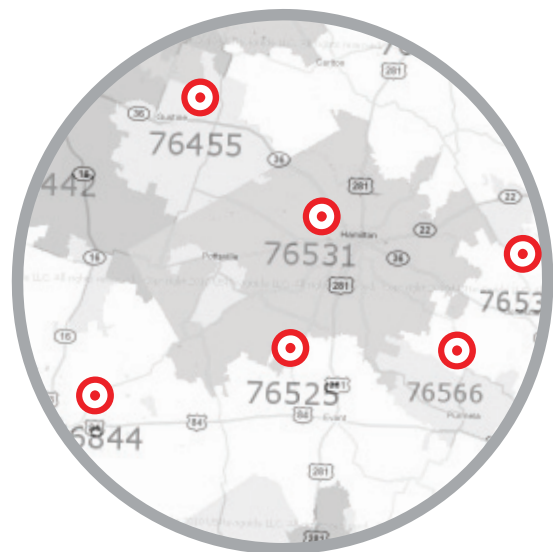
Tier II and Tier III marketers can impact brand consideration by advertising to a geographically targeted audience of in-market shoppers.

FULL STUDY

Background

With automotive marketing there are typically three tiers of advertisers that are responsible for building awareness, influencing consideration and intent, and ultimately driving vehicle sales. Though responsibilities and objectives may seem clear-cut, there tends to be overlap in what each tier is trying to accomplish.

Automotive manufacturers, known as Tier I, are responsible for establishing the brand, improving perception and creating demand. The regional dealer associations (RDAs), known as Tier II, typically focus their marketing efforts on driving shoppers within a region closer to the point of purchase and driving traffic into specific dealerships (often done with retail pricing or incentive messaging). Dealers, referred to as Tier III, are tasked with representing the brand, creating a positive shopping experience and ultimately, closing the sale. Because all parties have the objective of growing sales, goal overlap is not necessarily a bad thing.



Third-party automotive websites provide an opportunity for automotive marketers to communicate a message to a highly targeted audience of consumers who are at various stages of the vehicle shopping process. The brand manufacturers have long been taking advantage of this space and employing various strategies to drive consideration of their brand, convert competitive shoppers and retain loyal ones. Because the manufacturer has such broad coverage of this audience, there is a looming question in the industry of how relevant it is for Tier II and III marketers to maintain a presence on third-party sites and spend a portion of their budgets in this space. If it is in fact important for them to be there, what is the most cohesive strategy for all three to use their marketing dollars most effectively? The latter is unfortunately still dependent on too many variables to have just one answer. The question of the relevancy and value of Tier II and III advertising on third-party sites however, has been confirmed by the positive results from this study.

To address these industry concerns, Jumpstart embarked on a study to understand the impact that RDAs and dealer marketers have had on brand consideration when advertising to a geographically targeted audience of in-market shoppers. The study has been outlined based on the following:

Jumpstart's Solution

Provide regional and local advertisers market-level analyses of how their campaigns have impacted automotive shopping based on trends among Jumpstart's audience of in-market shoppers.

Note: Analyses were performed across Tier II and Tier III campaigns in which Tier I was also advertising in the in-market space.

Study Objectives

- Determine whether Tier II and III advertising can support Tier I efforts in driving incremental consideration for a brand in a specific market or region.
- Demonstrate the relationship between variances in traffic on in-market sites and advertising campaigns that were geographically targeted to Jumpstart's audience.
- Prove the value of in-market media for Tier II and Tier III by showing positive shopping behaviors resulting from effective media campaigns.
- Demonstrate that local market advertising presence provides additional support to the Tier I advertising messages on third-party sites in effectively driving consumers closer to purchase.

KEY HIGHLIGHTS

Share of Shoppers

Brands were able to grow their share of market by an average of 23 percent during the campaign and sustained growth by an additional 6 percent in the month after.

Traffic Growth

Make traffic on third-party sites grew an average of 12 percent during the month of an in-market campaign and another 19 percent in the month following.

Shopping Demand

Tier III groups recognized average demand growth in a region ranging from 31 to 56 percent after they began advertising on third-party automotive sites.

Results

The following section will demonstrate in-depth results as to how Tier II and Tier III advertisers were able to influence shopping in a specific market or region.

Each campaign was measured during a period in which Tier I was also advertising in the in-market space. What's also noteworthy is that the Tier II and III marketers only had geographic-targeting applied to their campaigns (did not target by segment, make or model specific pages), while Tier I purchased more specific targeting.

Brand Consideration Can Be Influenced on a Market Level

In evaluating brand impact in a market or region Jumpstart measured brand shopping and consideration through unique users, pageviews, brand share and leads or quote requests. The analysis compared these metrics during and after a campaign versus the period before an RDA or dealer was advertising across Jumpstart sites.

Results across all campaigns showed impressive growth in consumers shopping for various vehicle brands during a period in which the regional marketers were supporting the brand with local messaging.

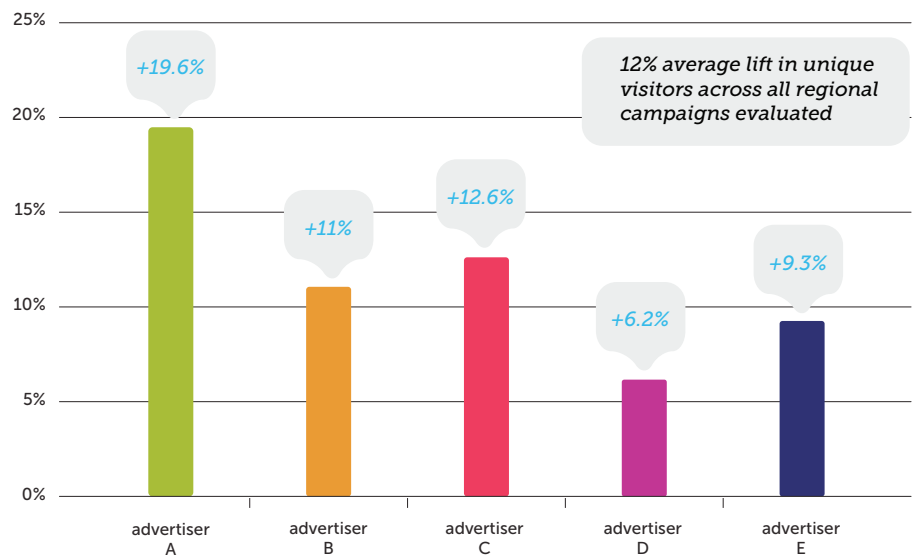
When looking specifically at unique users, the campaigns measured drove an average incremental growth of 12 percent in shoppers that were viewing brand or model pages on Jumpstart sites.

To control for overall market growth, Jumpstart weighed the percent growth of brand shoppers against the growth in the market. In the brand example below, a luxury import brand's shopper volume grew by 11 percent in one month of a regional campaign in Washington D.C. when the market only grew by 5 percent. Brand pageviews for the import also grew faster than the market at 14 percent during the same time period.

FIGURE 2.1.1

Average Lift in Unique Users During vs. Pre-Campaign Periods

August 2008–July 2009



Moving the Needle by Capturing Market Share

Another way in which the success of regional marketers can be measured is by viewing the impact of their advertising on a brand's share in that specific market. The variance in its share is then compared to key competitors in the market. Similar to the results found in growth in shoppers, the average share gained by brands during regional advertising campaigns was an impressive 23 percent.

Some brands successfully achieved a near 40 percent growth in share of market during the period when a local or regional message supported the national brand message.

FIGURE 2.1.2

Luxury Brand Shoppers Grow Ahead of Washington, DC Market

November–December 2009

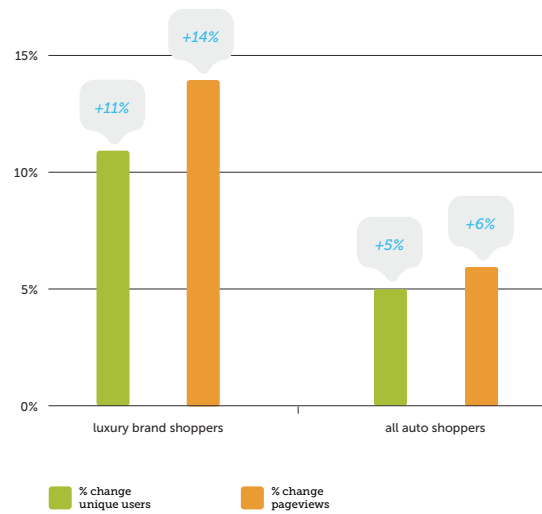
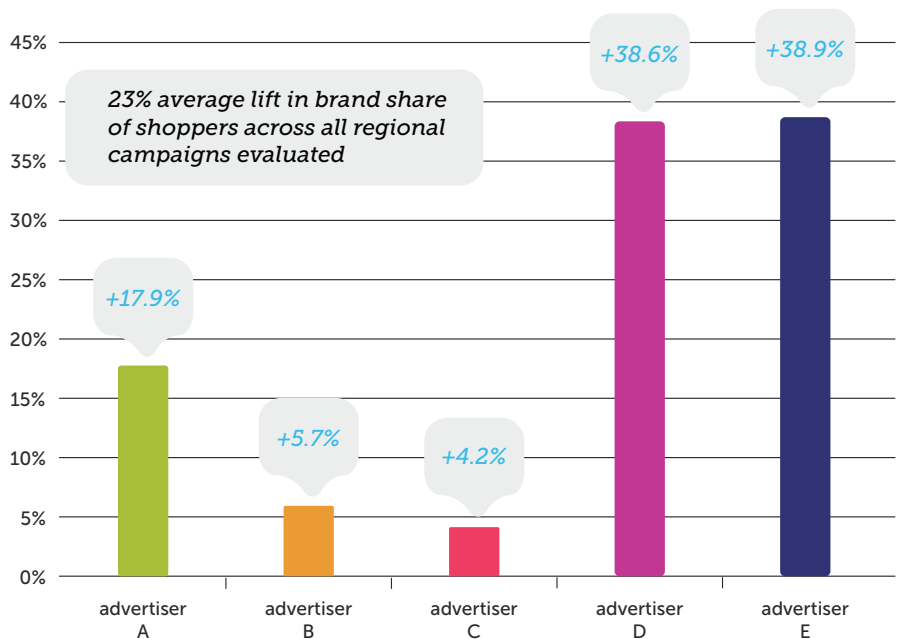


FIGURE 2.1.3

Variance in Share of Shoppers in DMA During vs. Pre-Campaign Period

August 2008–July 2009



Honda RDA Doubles Share of Market

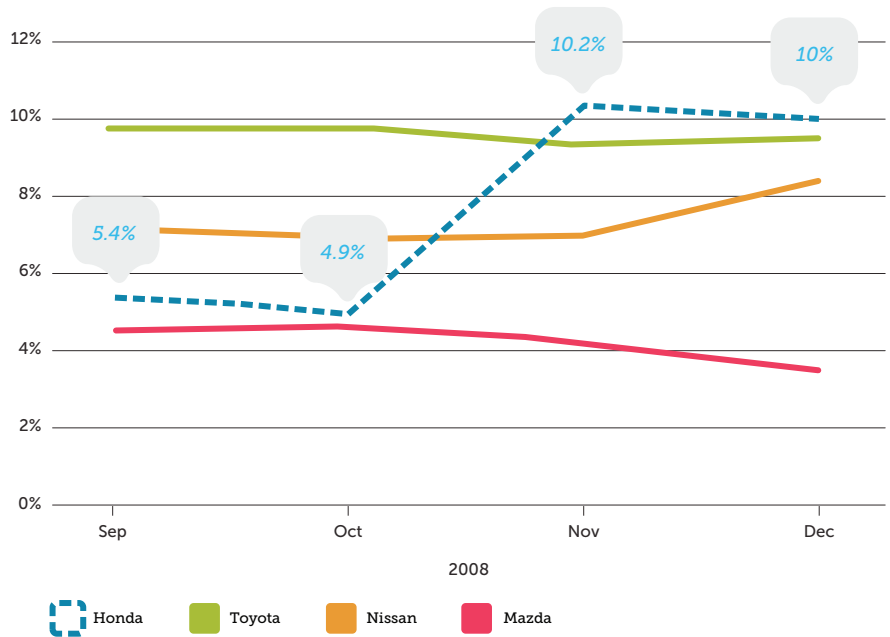
In October 2008, a Honda dealer association began testing in-market digital media in the Southeast. Although the automotive brand was advertising on brand and model pages, the RDA was aiming to grow Honda's share in the market and subsequently gain consideration from competitive shoppers such as Toyota, Nissan and Mazda. During the test period, none of the other brands had support in the same region on Jumpstart's sites.

Honda realized exemplary results from its test campaign. In just one month it was able to grow its share of market by over 100 percent. Prior to the dealer association's advertising campaign (initiated in the second week of October and running through the end of November), Honda was hovering around 5 percent share of market, falling slightly behind both Toyota and Nissan. In just six weeks of advertising, its share jumped to over 10 percent and pushed past both competitors to hold the highest share among all three. In addition to leaping ahead during its advertising period, Honda was able to sustain its position in the month following its in-market digital test.

FIGURE 2.1.4

Honda Grows Share in Southeast Market with In-Market Display Campaign

September–December 2008



Dealer Group's Successful Demand Creation

In another example, Jumpstart evaluated how a large dealer group was able to influence shopping consideration for multiple makes in a region. The dealer group covered the Northern California region and was advertising retail messages for Toyota, Honda and Nissan beginning in May 2009.

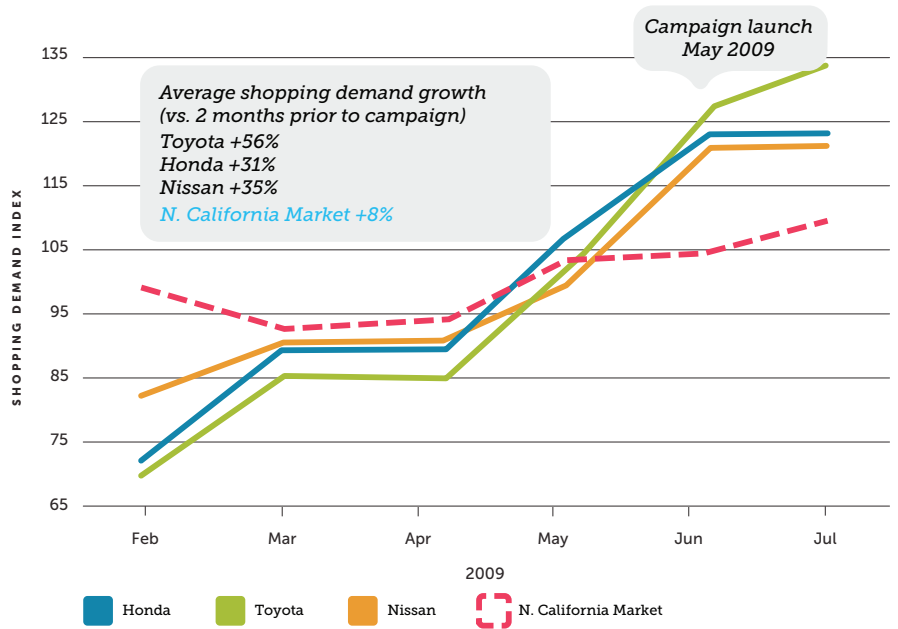
For the analysis, Jumpstart indexed brand shopping demand using traffic and engagement metrics across shoppers in the region. Prior to May, all three brands were performing below the

market but when the dealer's digital display campaigns began in May, each brand started to see growth in shopping demand. By the end of May, Honda started to outpace the market demand and soon, Toyota and Nissan followed. In just two months of advertising, each of the brands recognized significant growth in share of shoppers in Northern California ranging from 31 to 56 percent at a time when the market only grew by 8 percent.

FIGURE 2.1.5

Dealer Group Impacts Brands Shopped in Northern California

February–July 2009



Purchase Intent Strengthened Through Lead Growth

A final metric that was incorporated into this study are the brand leads submitted across Jumpstart’s sites. Brand leads are quote requests that consumers would submit for specific vehicles. While many consumers never submit quote requests online, Jumpstart has found that regionally focused display campaigns have driven larger volumes of leads either during or directly following an in-market campaign.

One of the brands evaluated was Toyota in the Los Angeles market. The dealer association began its first test of digital display advertising in the market in March 2009. Although

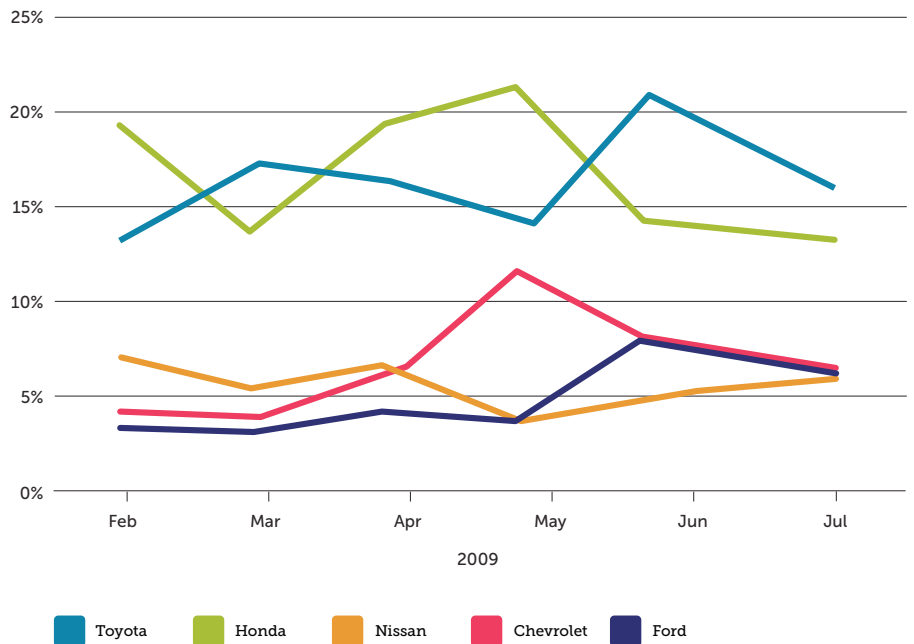
Toyota struggled to move ahead of Honda throughout its campaign, there was significant growth in leads from the beginning to end of its campaign of 60 percent (from 13 to 20.8 percent).

The example above demonstrates how Toyota’s share of leads submitted on Jumpstart sites grew 52 percent after the first month of advertising in the Los Angeles market. That growth was sustained through May when it saw a slight drop-off, but then picked back up to jump ahead 42 percent from May to June 2009.

FIGURE 2.1.6

Share of Leads Submitted in the Los Angeles Market

February–July 2009



Summary and Conclusions

Because regional and local automotive marketers are still trying to determine the most effective way to evaluate and engage with third-party in-market media, working with these publisher partners will be critical in understanding advertising impact. This is not to suggest that marketer-side metrics aren't valuable in analyzing a campaign, but measuring the shopping behaviors on third-party automotive websites and the demand creation that's occurring in the marketplace will add depth to the metrics for success. Measuring these behaviors will also provide a competitive perspective across a broad audience of automotive shoppers that client metrics alone aren't able to provide.

This study unquestionably proves that Tier II and Tier III marketers have the ability to significantly influence shopping behavior throughout a region or a specific local market even if Tier I is advertising to a similar audience, albeit in a more finely targeted capacity.

Methodology

- Review regional traffic trends across Jumpstart publisher websites (average unique users, pageviews and pageviews per user) in 2008 and 2009 to determine seasonal patterns.
- Examine multiple brands' traffic trends and market share in specific market or region (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.
- Index brand behaviors to measure shopping demand in a specific market or region and compare growth to the total market.
- Compare brand/model traffic in a specific market or region against key competitors' traffic on Jumpstart sites during and after a geo-targeted campaign.
- Identify growth in leads that were submitted by shoppers in a specific market or region across Jumpstart sites. Determine brand share against key competitors before, during and after a geo-targeted display campaign.

2.2 Subaru's In-Market Success Story

Subaru Leaps Ahead in Consideration Among Competitor Shoppers Through Sponsorship on Jumpstart Sites

SUMMARY

The Hypothesis

Vehicle sponsorships will generate consideration for key Subaru vehicles

The Test

Timing: October 2009

Vehicle: Subaru Outback

Targeting: Jumpstart crossover and wagon category shoppers

Findings

Key Publisher Metrics:

- Competitive shopper consideration grew up to 90 percent.
- Outback leads on Jumpstart sites grew 162 percent while all Jumpstart leads only grew 2 percent.

Consumer Engagement via Marketer KPIs:

- Engagement with Outback retention ads grew 56 percent.
- Post-click activities on Subaru's website grew 38 percent during the month of their category sponsorship.



FULL STUDY

Background

Subaru has been in the automotive spotlight for the past 18 months as it has swiftly and stably gained market share from domestic and Asian competitors. Its success during a down economy and an unprofitable automotive market has been unthinkable by most manufacturers. Many factors such as product quality, price value, dependability and niche segments have contributed towards this healthy growth, but there have also been significant strides in its marketing efforts.

When it comes to digital in-market media, where consumers are actively shopping for or researching their next vehicle purchase on third-party automotive websites, automotive brands have the ability to reach consumers through various stages of their shopping process. In fact, Jumpstart has conducted a number of studies showing success in growing consideration for a brand among segment shoppers, including among shoppers that were viewing specific competitive vehicles. Additionally, Jumpstart has found that only 50 percent of consumers coming to these sites have decided which vehicle category they are considering, and only 14 percent are sure of the specific model they'd like to purchase. The opportunity to influence that decision is abundant and allows advertisers to directly reach an in-market shopper without advertising waste.

Though Subaru has consistently maintained a presence on third-party automotive websites through the purchase of vehicle make and model pages, in 2009 it began exploring other upper-funnel or higher awareness placements such as homepage or vehicle category sponsorships. With a number of accolades won over the past two years, the goal for Subaru was

to increase awareness of its vehicles among shoppers within a given segment, as well as to retain those who were already considering Subaru. In mid- and late-2009, Subaru tested different strategies for promoting two vehicles within its lineup—the Legacy and the Outback, across Jumpstart websites.

The first approach was for the Legacy where Subaru employed a one-day homepage roadblock on Jumpstart sites on August 1, 2009. Due to the short length of time that the Legacy sponsorship appeared, as well as the timing coinciding with the U.S. Government run CARS (Cash for Clunkers) program, this study will focus more heavily on the second campaign, Subaru Outback. For the full month of October 2009, Subaru Outback sponsored Jumpstart vehicle category pages for crossovers and wagons and realized significant success in gaining consideration from in-market shoppers within the category.

Study Objectives

- Observe publisher metrics such as traffic, share of shopping, competitive activity, cross- and reverse cross-shopping data to determine the impact that Subaru's sponsorships had on consumer shopping activity.
- Evaluate marketer KPIs for retention campaign to determine if the growth in consideration from the sponsorship resulted in increased engagement from consumers who landed on the marketer's site after viewing campaign.

KEY HIGHLIGHTS

Traffic

- Unique visitors shopping the Subaru Outback increased 24 percent from September to October, when the sponsorship was live.
- Following the end of the campaign, Outback shopping dropped 3 percent in unique visitors and 9 percent in pageviews.

Share of Shoppers

- Outback's share of wagon and crossover shoppers grew 14 percent during the month of their sponsorship.
- During the same period some competitors saw decreases of 5 to 11 percent.

Cross- and Reverse Cross-Shopping Activity

- Competitive shoppers' consideration of the Outback increased from 6 to 90 percent from September to October. (Outback reverse cross-shopping).
- During this same period some competitors fell in consideration of Outback shoppers, namely Volvo XC70 (down 9 percent) and Volkswagen Passat (down 28 percent). (Outback cross-shopping).

Leads submitted

- Outback's leads submitted by Jumpstart shoppers grew 162 percent from September to October, while all leads submitted only grew by approximately 2 percent over that same time period.
- Subaru's leads overall were up 63 percent in share and 84 percent in volume in October after having been down nearly 70 percent the prior month.

Marketer metrics

- Outback's campaign was successful not only in gaining consideration of shoppers, but also in driving them to model pages and increasing engagement with ads on those pages of up to 56 percent.
- Post-click activities from Subaru's retention ads increased 38 percent during the month of its category sponsorship.

Traffic Growth

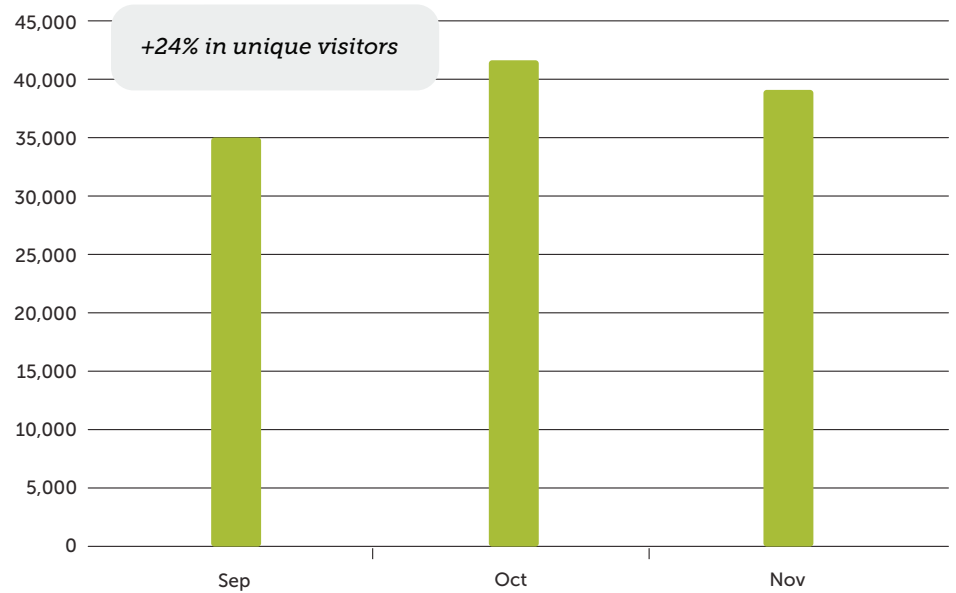
During the entire month of October 2009 Subaru Outback sponsored Jumpstart's vehicle category pages for crossovers and wagons touting the 2010 vehicle being "Newly Re-designed with More Room for Adventure." The sponsorship resulted in Outback realizing a 24 percent increase in unique visitors to its model pages. The growth in consideration from shoppers did not result in growth in the number of pages viewed during this period.

Over this time period, a number of key competitors saw a decrease in traffic ranging from 4 to 21 percent. As the market has been shifting from sedans and SUVs to crossovers, Jumpstart has found similar trends in shopping interest to the crossover category. Overall visits to wagon and crossover pages on Jumpstart sites were up 8 percent during October compared to September.

FIGURE 2.2.1

Subaru Outback Unique Visitor Traffic

September–November 2009



Share of Segment Shoppers

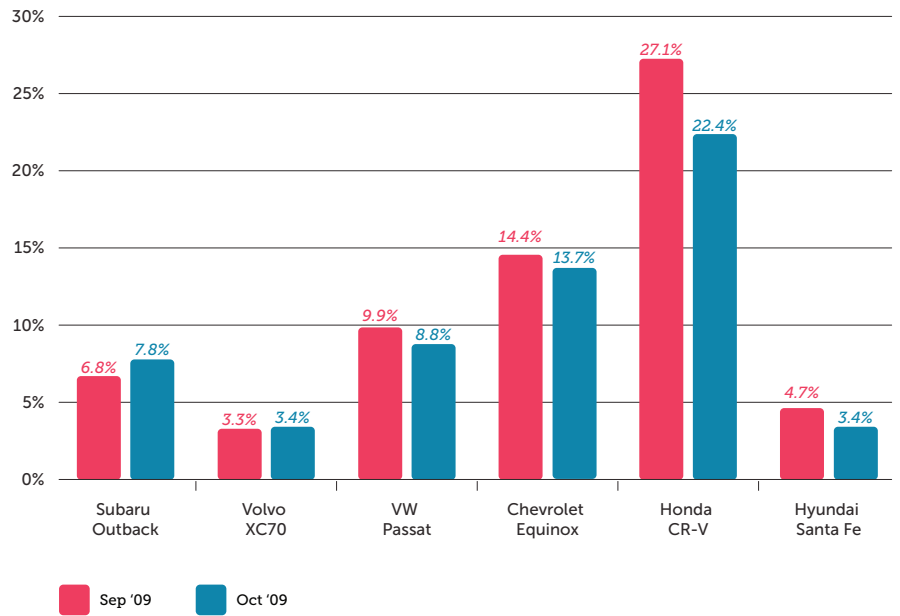
When evaluating a vehicle against competitors in the segment it is important to gauge which vehicles hold the highest share and what causes the fluctuation. To understand the impact that Outback's sponsorship had on the share of wagon and crossover shoppers, the top cross-shopped vehicles were used as a

comparison. The Outback was able to grow its share nearly 14.5 percent in October, while all key competitors (with the exception of Volvo XC70) dropped from nearly 5 to 27 percent in share.

FIGURE 2.2.2

Share of Wagon/Crossover Shoppers

.....
September–October 2009



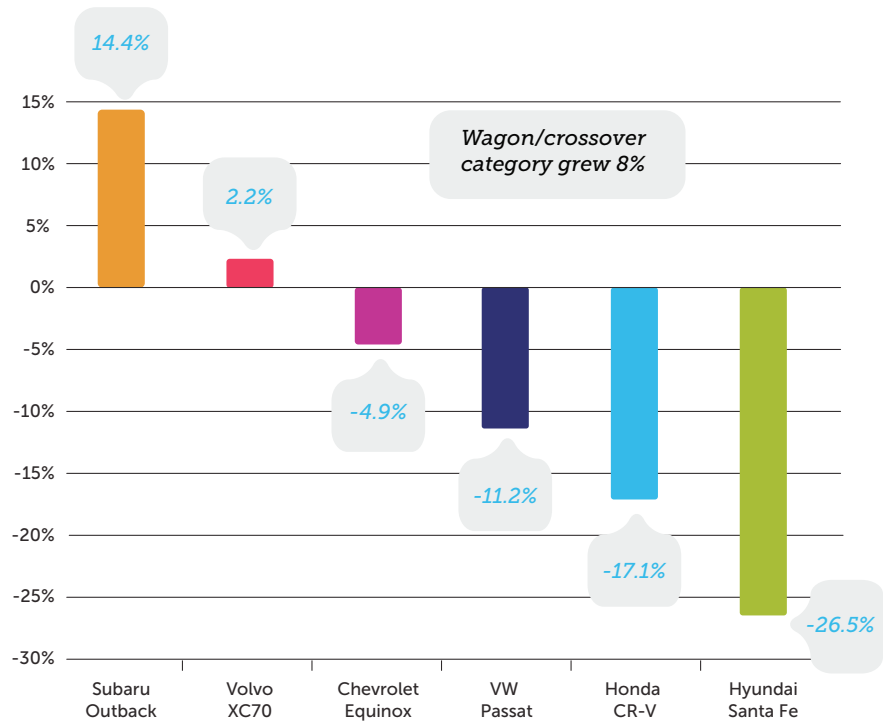
With Outback typically targeting more of a niche market, the growth in consideration as seen in the share of Jumpstart shoppers in a broader category is astounding. Being a low-volume vehicle in terms of sales (ca. 86,000 in 2009, Wards AutoInfoBank, January 2010), Outback's nearly 14.5 percent growth in share demonstrates significant success when

considering the entire category only grew at 8 percent. Even more compelling is the comparison of the Outback's growth in share vs. a higher volume and more mainstream vehicle such as the Honda CR-V (sales of ca. 191,000 in 2009), which dropped 17 percent in consideration during the same period.

FIGURE 2.2.3

Variance in Share of Wagon/Crossover Shoppers

September–October 2009



Growth in Consideration among Competitive Shoppers

Similar to the competitive set that was viewed in gauging the impact on share of segment shoppers, cross-shopping activity is used to gauge shifts in consideration among competitive shoppers. Cross-shopping samples the consumers that began their shopping with the Subaru Outback, and then measures the frequency with which they looked at competitors. For example, in this analysis Outback shoppers' consideration for key competitors the Volvo XC70 and Volkswagen Passat dropped 9 and 28 percent respectively when Outback employed its category sponsorship on Jumpstart sites.

Another compelling way to view this data is by looking at the reverse of this concept. Reverse cross-shopping evaluates the frequency at which competitive shoppers are viewing the Outback (vehicle shopping or research originates with a competitive model). If you look at the flipside of this analysis, Jumpstart has found convincing results to support the belief

that category sponsorships are effective in driving increased consideration from shoppers within the segment that have not yet determined a specific model for their next purchase.

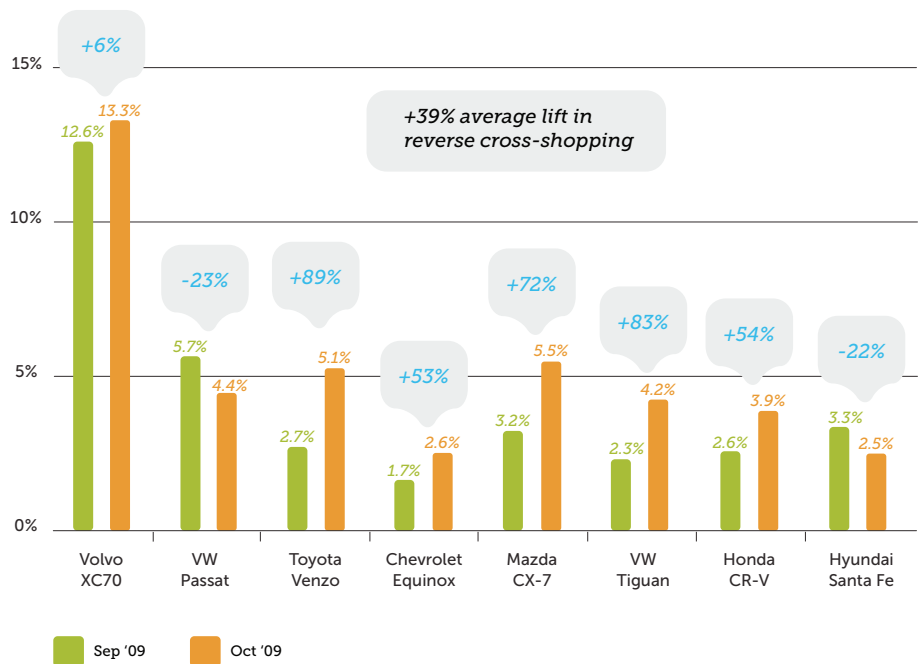
In this case, competitive shoppers who also viewed the Subaru Outback grew at an average rate of 39 percent during the month of its sponsorship in October 2009. Among specific competitors such as Toyota Venza and Volkswagen Tiguan, consideration grew at astounding rates of 89 and 83 percent respectively.

Although Outback's share of segment shoppers grew against the Volkswagen Passat and Hyundai Santa Fe, the frequency with which these competitors' shoppers were viewing the Outback did not increase. Consideration against higher-volume vehicles such as the Chevrolet Equinox and Honda CRV grew at successful rates of 53 and 54 percent.

FIGURE 2.2.4

Reverse Cross-Shopping for Subaru Outback

September–October 2009



Increase in Lead Volume and Share

For the first time in 2009, Subaru Outback jumped to the top of lead submittals with the highest share among all vehicles in October. Not only did it achieve the highest leads, its growth in share was 158 percent from September. Measuring volume of leads, Outback saw growth of 162 percent when total leads submitted across Jumpstart sites grew by only 1.7 percent.

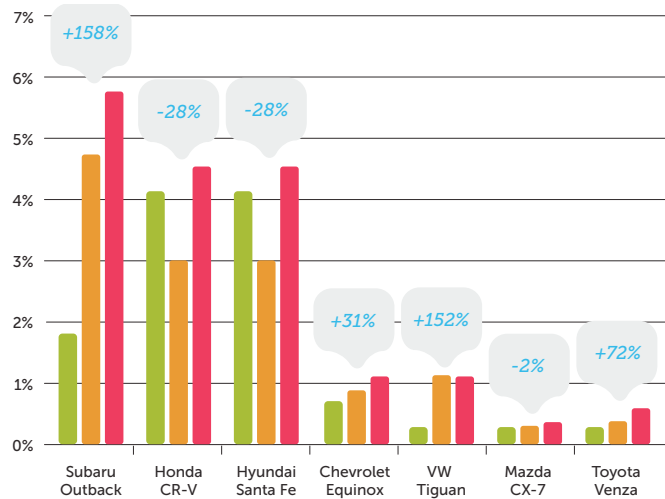
Although Outback’s sponsorship ran through the end of October, its growth continued into November with another 23 percent increase in lead volume and a 22 percent increase in share. Outback maintained the highest lead volume and share of leads for the second consecutive month across all vehicles on Jumpstart sites.

In addition to measuring the leads that were submitted on Jumpstart sites, Subaru asked that Jumpstart evaluate the conversion of wholesale leads that were purchased from Jumpstart during this period. In October 2009, the adjusted 90 day close rate was 18 percent above Subaru’s national close rates. From October through December, these rates were an average of 20 percent above the national level.

FIGURE 2.2.5

Share of Leads Submitted on Jumpstart Sites

September–November 2009



Marketer Metrics

Over time, Jumpstart has taken the position that there is evident value in advertisers utilizing both third party automotive site data and marketer metrics (KPIs) to evaluate in-market media success. Bringing this holistic approach to life, Subaru provided Jumpstart with access to its post-impression and click activities in order for this study to encompass the broader view of shopper activity following campaign exposure.

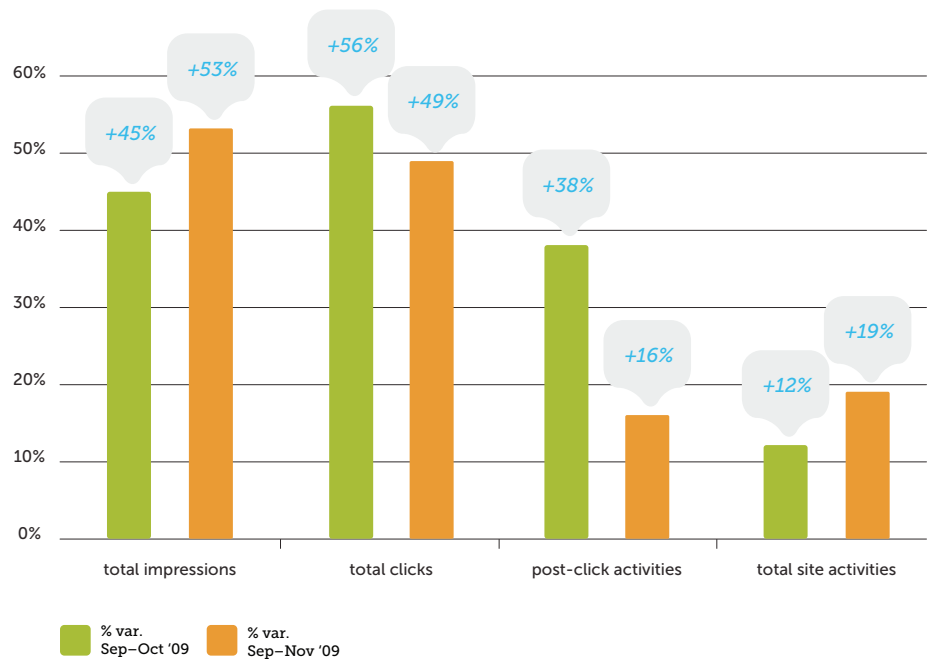
A number of factors on Subaru Outback pages were positively influenced by the crossover/wagon sponsorship campaign that ran in October 2009. Not only was the campaign successful in driving an incremental 24 percent of shoppers to Outback pages, but the engagement of Outback shoppers with the advertising on those pages increased significantly.

With an increase in unique users, total ad impressions delivered on model pages jumped 45 percent from September to October, and though the growth slowed down drastically, Outback enjoyed another 6 percent growth in impressions in November. Although knowing that clicks on an ad don't necessarily translate into purchase intent, Jumpstart found that a 56 percent increase in clicks also drove 38 percent growth in post-click activities such as "Request a Quote," "Schedule a Test Drive," "View Inventory," and "View Special Offers." Outback's sponsorship clearly helped drive consideration for the vehicle and drove consumers further down the purchase funnel as seen in both the publisher and marketer metrics.

FIGURE 2.2.6

Subaru Outback Retention Performance

.....
September–October 2009



Summary and Conclusions

In evaluating each of these metrics, publisher- and marketer-side, the upper funnel advertising on Jumpstart sites was effective in increasing awareness and consideration of the vehicles. As a brief recap of success measures, the following results were achieved during the month of their category sponsorship:

- Driving awareness: 24 percent growth in unique visitors shopping the Subaru Outback.
- Increasing Consideration: 39 percent average lift in consideration among competitive shoppers.
- Gaining share within segment: 14.4 percent growth in Outback's share of the crossover/wagon segment.
- Increasing leads and lead quality: 162 percent increase in lead volume and 158 percent growth in share.
- Driving lower funnel activities: 38 percent growth in post-click activities on marketer website.

Methodology

- Review Subaru monthly and daily traffic trends across Jumpstart publisher websites (average unique users, pageviews and pageviews per User) in 2009 to determine seasonal patterns.
- Examine multiple competitive 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.
- Evaluate brand/model traffic trends against vehicle segment trends to determine average variance in share of segment shoppers during awareness advertising flight.
- Compare brand/model traffic against key competitors' traffic on Jumpstart sites during awareness campaign.
- Identify any positive changes in cross- and reverse cross-shopping data as a result of the consideration generated from awareness advertising.
- Analyze variance in vehicle lead volume and share of leads submitted on Jumpstart sites for brands or vehicles evaluated in the study.
- Evaluate key performance indicators (KPIs) provided by client to determine the impact awareness campaign had on marketer metrics from retention campaign.
- Analyze conversion rates from client on lead submittals to determine the impact of awareness campaign on lead quality and close rates.

Subaru Legacy Homepage Roadblock Results

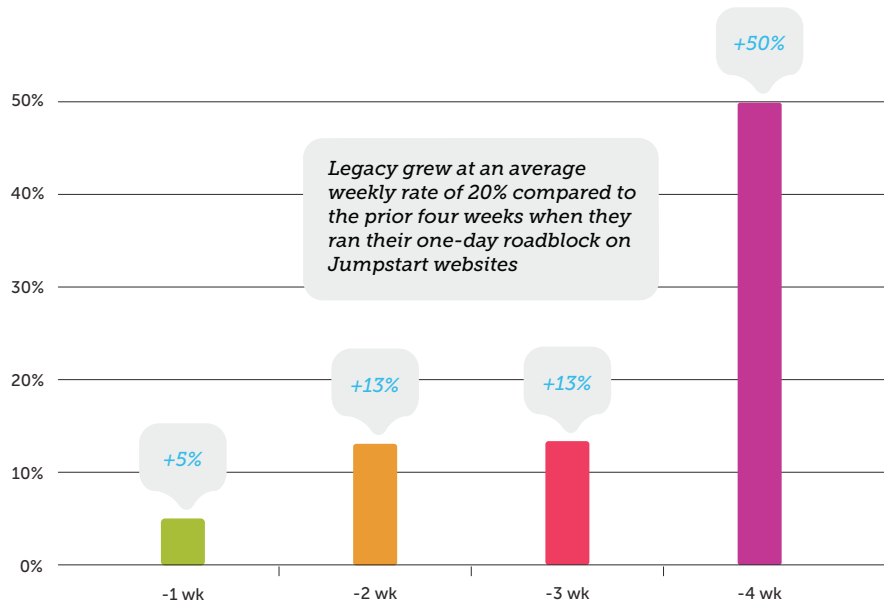
August 2009 was a difficult month to gauge advertising effectiveness across the entire industry due to the timing of the U.S. government CARS program. As many remember, the program not only spurred sales, it increased sales at a higher volume than was ever anticipated, causing the government to extend the program through the end of August. That being said, the Legacy's one-day sponsorship on Saturday, August 1, 2009 saw some successes believed to be the result of its advertising efforts rather than the state of the market.

When comparing the Legacy's one-day traffic on August 1st to the prior four Saturdays in July, an average weekly growth of 20 percent was realized. The greatest lift was found when evaluating the same week in July, where Legacy traffic grew 50 percent. Due to the limited timeframe of this campaign, this success was not sustained enough throughout the month of August to impact the vehicles share of sedan shoppers on Jumpstart sites.

FIGURE 2.2.7

Subaru Legacy Traffic Growth

Saturday, August 1, 2009 vs. prior four Saturdays



Section 3:

Automotive Marketing Insights

3.1 Highlights of Super Bowl 2010 Automotive Advertising ROI

March 4, 2010

To determine automotive advertising’s return on investment during this year’s Super Bowl, Jumpstart analyzed the model-specific growth in share among automotive shoppers across 11 automotive shopping websites and the estimated price each manufacturer paid for every percent in share gained. The analysis was performed using an average assumed total ad dollars spent by each of the automakers on the Big Game, conducted over three weeks from February 7 to February 28, 2010.

Based on the study, which used an assumed benchmark average of \$2.5 million per 30-seconds of Super Bowl in-game air time, Kia spent the lowest amount for every percent of market share

gained at approximately \$255,000 for the Sorento, with an average three week increase in share among automotive shoppers of 19.6 percent, the second highest increase in the study. Hyundai paid the second lowest amount of approximately \$336,000 for every percent of market share gained for the Sonata, while experiencing the highest average three week increase of share among automotive shoppers at 22.3 percent. On the other hand, Audi’s market share among automotive shoppers dipped half a percent even after its approximated \$5 million media buy.

FIGURE 3.1.1

Results of the Model-Specific Analysis

Make	Model	Estimated 2010 Super Bowl Advertising Expense	Average 3-Week Growth Among Automotive Shoppers	Approximate Price per % of Share Gained
Kia	Sorento	\$5.0M	19.6%	\$255K
Hyundai	Sonata	\$7.5M	22.3%	\$336K
Dodge	Charger	\$5.0M	10.4%	\$480K
Audi	A3	\$5.0M	-0.5%	\$5M

“Quantifying Super Bowl ads is difficult for automotive advertisers since consumers don’t typically wake up Monday morning and purchase the automotive they saw in an ad.” said Joe Kyriakoza, VP of Strategic Insights at Jumpstart. “Most of the companies that spent the cash enjoyed an increase in share that, at least over the last three weeks, demonstrates positive ROI against their investment.”

Kyriakoza, an automotive marketing and brand expert, says the Jumpstart analysis is intended to help automotive marketers develop a greater understanding of how offline media, especially broad-reaching events like the Super Bowl, impact true shopping behavior and brand consideration.

The study further reveals that in the first week following the Super Bowl all the models featured during the Super Bowl,

The Kia Sorento was the only vehicle that saw continued growth in automotive shopper market share into the second and third weeks of February 2010.

the Hyundai Sonata, the Ka Sorento and the Dodge Charger saw the greatest lifts in share among automotive shoppers at 28.7, 14.7 and 9.8 percent, respectively. Of all the models featured during the Super Bowl, the Kia Sorento was the only vehicle that saw continued growth in automotive shopper market share into the second and third weeks of February 2010.

Manufacturers with Super Bowl ads that were not part of the three-week Jumpstart analysis included Volkswagen, Honda and Acura, due to a lack of model-specific messaging or data. For example, Volkswagen’s “Punch Dub” ad focused on the overall brand, not on specific Volkswagen products, while the Acura ZDX coupe concept ad and the Honda Crosstour ad featured new-to-market vehicles that lacked the historical shopping data required for proper analysis. However, Jumpstart did evaluate overall brand performance for Volkswagen, Acura and Honda for the day following the Super Bowl, with all three brands recognizing an increase in market share among automotive shoppers of 10.8, 10.5 and 4.8 percent, respectively, from February 7 to 8, 2010.

The three week analysis was performed across Jumpstart’s automotive websites. Jumpstart’s 2010 online audience consists of a monthly average of 12 million unique automotive shoppers and enthusiasts across all web properties, with each vehicle’s brand share calculated by unique visitors to its brand pages versus the total audience. Jumpstart has performed numerous analyses that demonstrate that brand consideration can be influenced by online and offline factors such as events, sponsorships, launches, pricing incentives and editorial features.

3.2 Super Bowl 2011 Advertising Generates Strong ROI for Chevrolet, Mini, Kia and Volkswagen

March 23, 2011

Jumpstart's second annual Super Bowl automotive advertiser ROI study analyzes the return on investment among this year's Super Bowl automotive advertisers, with Chevrolet, Mini, Kia and Volkswagen taking top billing among the 10 manufacturers that advertised during the Big Game.

The Jumpstart study examined model-specific growth in share among automotive shoppers across 14 automotive shopping websites with over 14 million monthly visitors and the estimated price each manufacturer paid for every percent in share gained. The analysis was based on average assumed total ad dollars spent by each of the automakers during the Super Bowl.

The study was conducted over a six-week period beginning three weeks prior to the Super Bowl, to establish benchmark metrics for the automotive brands slated to run spots during the game, and then extended three weeks post-Super Bowl, to better understand the enduring effects of the large investments that come with Super Bowl advertising.

The study, which used an assumed average of \$2.8 to 3 million per 30-seconds of Super Bowl in-game air time revealed:

- Chevrolet spent the lowest amount for every percent of market share gained at approximately \$65,000 for its Silverado, and just slightly more than the number two finisher at \$78,000 for its Volt, with an average increase in share among automotive shoppers of 46 and 39 percent, respectively.
- BMW's Mini brand spent approximately \$68,000 for every percent of market share gained, with an average increase in share among automotive shoppers of 44 percent for its Countryman.

- Kia spent approximately \$81,000 for every percent of market share gained for the Optima, while experiencing the highest average increase in share among automotive shoppers at 74 percent. During last year's Super Bowl, Kia spent the lowest amount of approximately \$255,000 for every percent market share gained for its Sorento.
- Volkswagen rounded out the top five at approximately \$104,000 for every percent of market share gained, with an average increase in share among car shoppers of 42 percent for the Beetle.

"The overriding theme is that, during our extended analysis including pre- and post-Super Bowl metrics, this year's Big Game ads have had an enduring effect on automotive shopping growth for a handful of vehicles."

said Joe Kyriakoza, Jumpstart’s Vice President of Product and Performance Strategy. “While most of the manufacturers experienced a positive ROI against their investment, Chevrolet, Mini, Kia and Volkswagen significantly outdistanced the rest of the pack. The automotive vertical was crowded with 15 different vehicle messages throughout the game, so it’s not unusual that only a third of them would break through.”

Kyriakoza, an automotive marketing and brand expert, says the Jumpstart analysis is intended to help automotive marketers develop a greater understanding of how offline media, especially broad-reaching events like the Super Bowl, impact true shopping behavior and brand consideration.

The study further revealed that manufacturers like Audi, Hyundai and Mercedes-Benz that struggled to drive similar sustained

growth in market share likely fell victim to a Super Bowl that was heavy on automotive ads, allowing only a few to truly cut through an event that already boasts an abundance of advertising messages.

The six-week analysis was performed across Jumpstart’s automotive websites. Jumpstart’s online audience consists of a monthly average of 14.2 million unique automotive shoppers and enthusiasts across all web properties, with each automotive brand’s share calculated by unique visitors to its brand pages vs. the total audience. Jumpstart has performed numerous analyses that demonstrate that brand consideration can be influenced by online and offline factors such as events, sponsorships, launches, pricing incentives and editorial features.

FIGURE 3.2.1

Results of the Jumpstart 2011 Super Bowl Automotive Advertiser ROI Study

Make	Model	Estimated 2011 Super Bowl Advertising Expense	Average 3-Week Growth Among Car Shoppers	Approximate Price per % of Share Gained
Chevrolet	Silverado	\$3M	46%	\$65K
Mini	Countryman	\$3M	44%	\$68K
Chevrolet	Volt	\$3M	39%	\$78K
Kia	Optima	\$6M	74%	\$81K
Volkswagen	Beetle	\$3M	29%	\$104K

3.3 Small Car Shopping Growth: Pent-Up Demand or Just Window Shopping?

September 13, 2010

The compact segment has seen its share of ups and downs in the past few years. Back when gas prices were above four dollars in the summer of 2008, interest in compact vehicles—or anything that consumed less fuel—was thriving and improved sales of these vehicles followed. In fact Polk recently confirmed that the subcompact category (or “lower small”) more than doubled from 2005 to 2008 in sales of vehicles like the Nissan Versa and Honda Fit.

When oil costs normalized, so did consumers’ eagerness to jump into a smaller vehicle, creating an opening for the utility-driven crossovers that serve the needs of families and outdoor enthusiasts alike—making 2009 effectively the year of the crossover. Crossover traffic boomed on Jumpstart properties in 2009, capturing over 6 percent share of shopping by year’s end, at a growth rate of over 50 percent compared to its share in 2008.

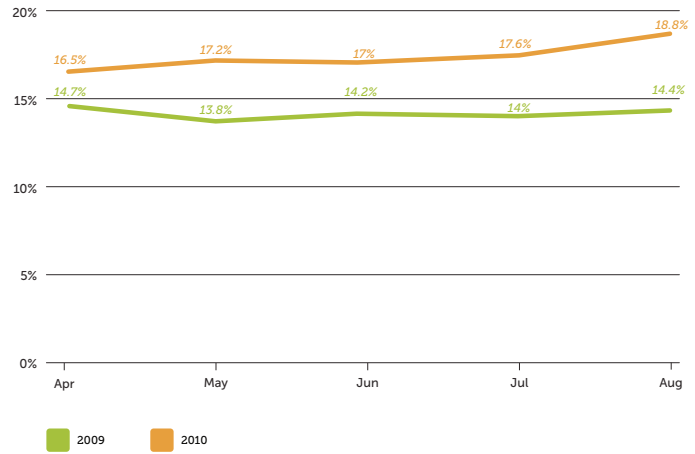
More recently, over 330,000 compacts were sold last August, mostly as a result of the government CARS, or Cash-for-Clunkers, program. Compacts were prevalent for the program because nearly all of them met the fuel efficiency standards set to qualify for the discount. This past August, understandably only about half as many compacts left dealer lots.

Despite the nearly 50 percent drop in sales from August 2009 versus August 2010, compact sales volume is up 6 percent this year (excluding August). What’s more telling is the staggering growth in interest in small vehicles thus far this year. From April through August, compact share of shopping on Jumpstart properties has grown an average of 12 percent per month versus the year-to-date average. When comparing the same time period last year, compact shopping share has increased by an average of 23 percent during the spring and summer months.

FIGURE 3.3.1

Compact Share of Shopping

April–August 2009 vs. 2010



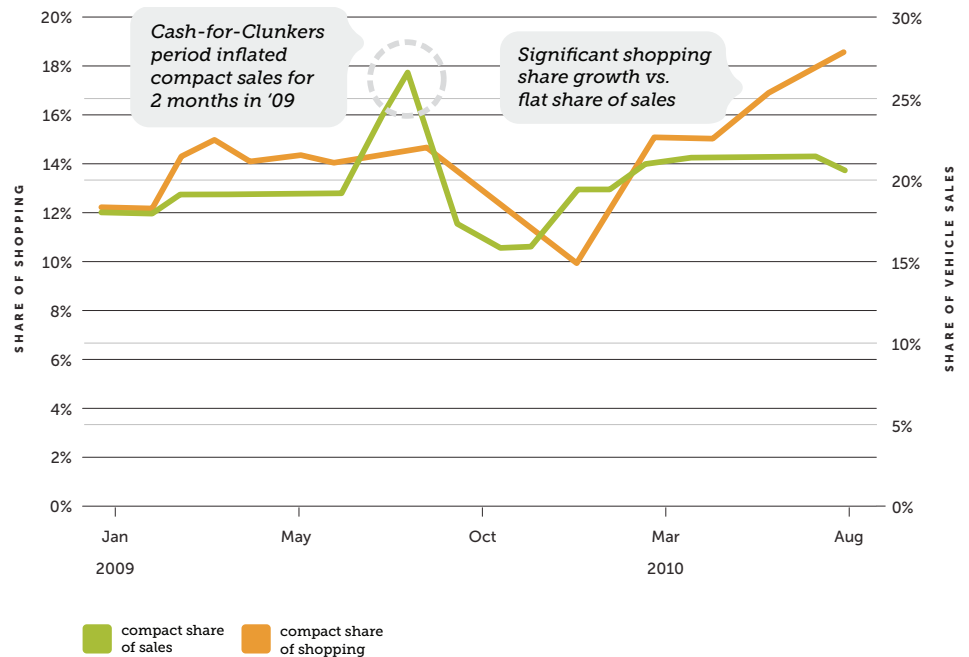
While compact sales have increased gradually this year, they haven't improved nearly at the pace of shopping. The share of shopping for compacts is compared to the share of actual vehicle sales for the compact segment.

As demonstrated here, shopping share has grown exponentially over the past six months. Share of shopping for compacts in August is up 21 percent versus the year-to-date average, while sales share is down 3 percent in August versus year-to-date.

FIGURE 3.3.2

Share of Shopping vs. Share of Sales, Compact

January 2009–August 2010

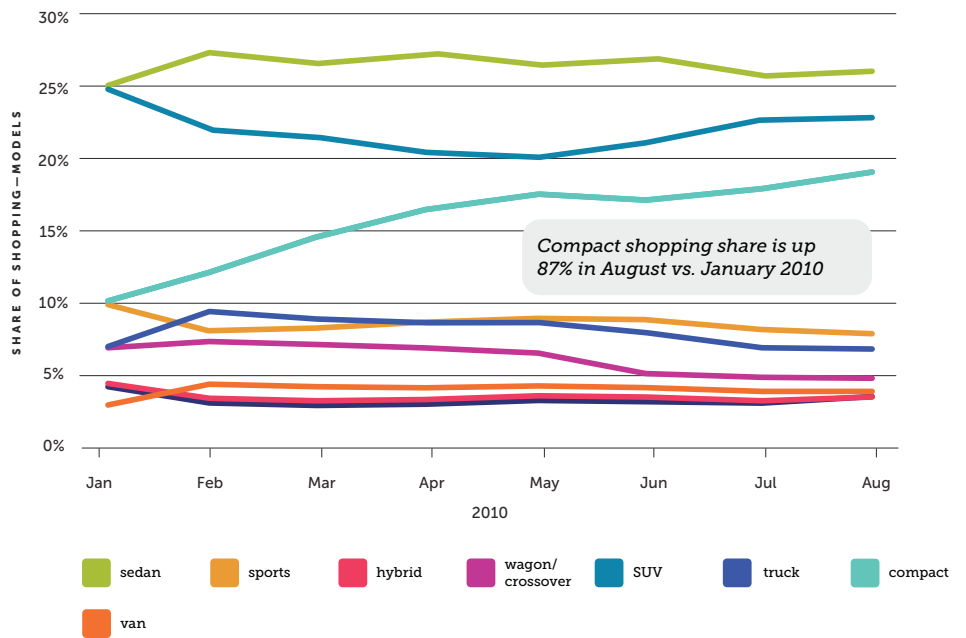


When comparing compact shopping to the rest of the primary vehicle segments, it's the only one with any type of significant growth in share over time, while most of the popular segments show little growth year-to-date. In August, compact shopping share improved by 87 percent versus January, while sales share ironically fell by 8 percent.

FIGURE 3.3.3

Compare Share of Shopping Growth vs. Other Segments

January–August 2010



With all of these factors demonstrating a greater growth in compact vehicle purchase intent, this begs the question: is the year of the compact upon us? The last four months of the year could potentially drive a heftier share of market towards compacts if the current shopping demand being revealed results in later term purchases.

After a generation of desire for trucks and SUVs, Americans could finally be warming up to smaller, more fuel efficient and compact vehicles. Interestingly, fuel costs haven't changed much, sitting below three dollars all year and families aren't getting smaller. The wave of interest in the compact segment, traditionally divided into three buckets—upper small, lower small and small specialty—has been convincingly driven by more

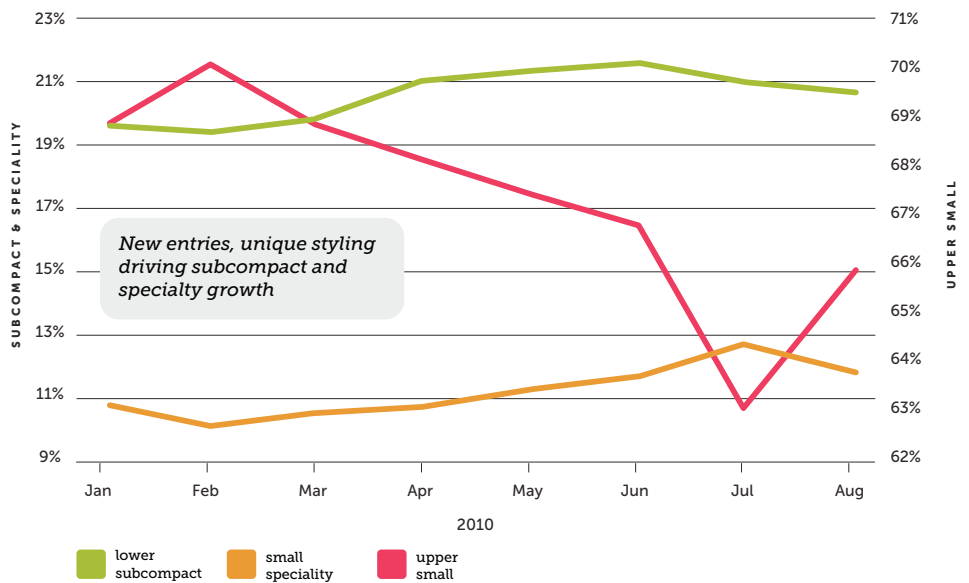
vehicles to choose from in the segment, heftier marketing support (Ford Fiesta, Chevrolet Cruze, Kia Soul, etc.) and, more importantly, noticeably better product.

A segment for decades dominated by the Toyota Corolla and Honda Civic now boasts new entries that deliver more car for the money, especially in the lower small and specialty groups. The trajectory in shopping for lower small (like the Ford Fiesta or Nissan Versa) and small specialty (like the Mini Cooper and Scion xB) is greater than that of the traditional favorites in the upper small category like Civic and Corolla.

FIGURE 3.3.4

Subcompact and Speciality Small Vehicles Trending Stronger Than Upper Small, Share of Shopping vs. Entire Segment

January–August 2010



Advanced interior options and safety features have made the small vehicle more appealing, in addition to the socially responsible consumer looking to make a green statement without the need to pony up thousands more for a hybrid or fiddle with a new technology like EV.

The CAFE standards that have been set forth by the Obama Administration (a fleet average of 35 MPG) also have something to do with these developments. The domestic automakers were not well represented in the segment in the past and many of the imports have gotten much more creative about their approach to the small vehicle with brands like Scion and Kia challenging traditional design standards.

Most recently, the Ford Fiesta has set the gold standard for marketing excellence in the category. Through the company's Fiesta Movement program, they turned to consumers to drive

inclusion of many of the features and bells and whistles on the vehicle. Ford is enjoying a powerful opening into the compact market with its 2011 models recently hitting dealerships behind tremendous momentum.

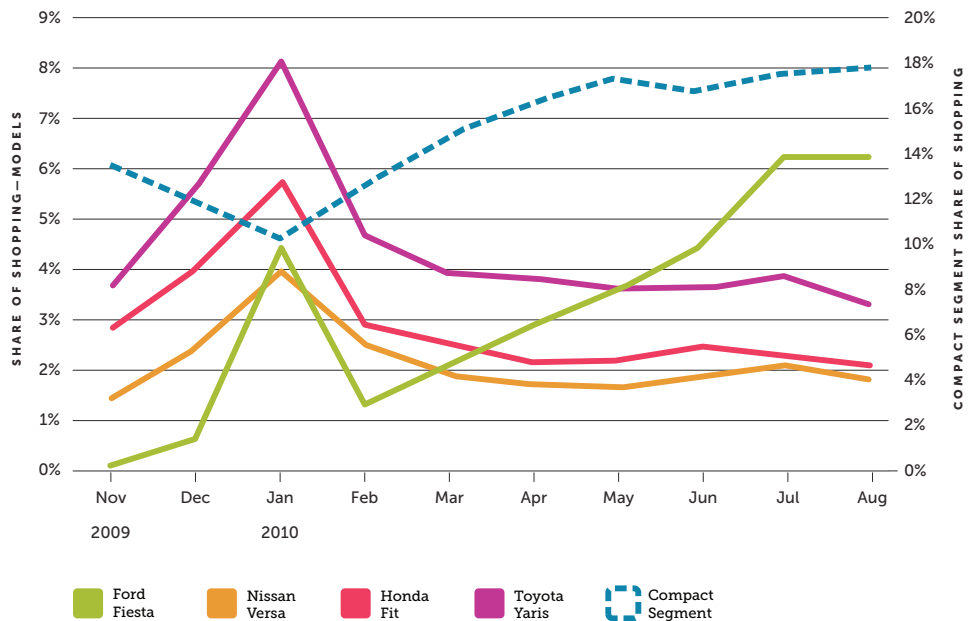
Interest in Fiesta, considered a subcompact or lower small, has soared on Jumpstart's automotive shopping sites over the past eight months as a result of this momentum, with 65 percent growth in July and 30 percent growth in August versus the year-to-date average. In fact in the month of July, Fiesta was the most researched vehicle on Jumpstart's properties across all categories. It may not be a stretch to say that Fiesta has almost single-handedly elevated interest in an entire segment. Share of shopping in the segment for Fiesta surpassed historic subcompact leaders Toyota Yaris, Nissan Versa and Honda Fit as of June.

FIGURE 3.3.5

Ford Fiesta Trajectory Helps Lift Compact Segment

November 2009–August 2010

Share of Compact Segment Shopping since Nov. 09, when Fiesta content was first available on Jumpstart properties, vs. historic leaders in Lower Small Category



Kia's goofy yet effective hamster ad for the Soul has expanded interest ahead of similar Scion and Nissan models. The Mini Cooper, considered a trailblazer in the segment, is regaining interest and consideration, while the quirky, recently launched Nissan Cube is earning new shoppers. Volkswagen's overall brand success has also translated to strong interest in the Jetta.

While Toyota is absent from the growth list aside from Prius, Yaris still commands 13 percent shopping share of the lower small group (behind only the Honda Fit and Hyundai Accent) and the Toyota Corolla 12 percent of the upper small category (second only to the Honda Civic). Toyota's Scion brand, which

had recently fallen on hard times, is showing strong consideration growth for its xA, xB and xD models.

Honda, also not one of the growth leaders in the segment, continues to lead in share of shopping for the lower small segment with Fit capturing 21 percent, while Civic delivers in the upper small segment with 17 percent share of shopping.

In the past two months, interest in compacts has seen double-digit growth. Specific vehicles, including the Fiesta and Kia Soul, have contributed heavily in the shopping gains.

FIGURE 3.3.6

Largest Increases in Share of Shopping, Compact

Summer 2010

Make	Model	June 2010	July 2010	August 2010
Compact Segment		21%	20%	30%
Ford	Fiesta	26%	65%	30%
Dodge	Caliber	2%	18%	20%
Hyundai	Elantra	4%	12%	9%
Kia	Soul	14%	35%	23%
Nissan	Cube	-7%	6%	16%
Scion	xA	14%	7%	8%
Scion	xB	4%	5%	5%
Scion	xD	6%	25%	29%
Volkswagen	Jetta	3%	16%	19%
Mini	Cooper	flat	7%	19%
Toyota	Prius	4.7%	4.4%	-1%

FIGURE 3.3.7

Largest Declines in Share of Shopping, Compact

.....
Summer 2010

Make	Model	June 2010	July 2010	August 2010
Chevrolet	Aveo	-12%	-32%	-24%
Hyundai	Accent	-14%	-23%	-17%
Kia	Rio	-12%	-24%	-17%
Toyota	Yaris	-13%	-24%	-17%
Honda	Fit	-13%	-17%	-11%
Kia	Spectra	-11%	-18%	-19%
Smart	Fortwo	-13%	-21%	-18%
Nissan	Sentra	-4%	-13%	-17%
Toyota	Corolla	-5%	-13%	-15%

If trends stay true to historic patterns, the growing interest in compacts during the past four months should lead to an uptick in sales for the remainder of the year.

The small vehicles available today are considerably better than the patchwork small vehicles of yesteryear, when people were lucky to have power windows, let alone power steering available in a compact. Today's models are fully equipped with the highest

standards in safety features, luxurious interiors and, of course, excellent fuel economy.

Is this shopping growth a sign of pent-up demand or simply a lot of window shopping? In a very irregular economy it's difficult to tell, but all signs point to the compact segment representing a larger share of the pie in the coming months.

3.4 Facebook Proves Highly Effective Outlet in the Ford Explorer Unveiling

August 23, 2010

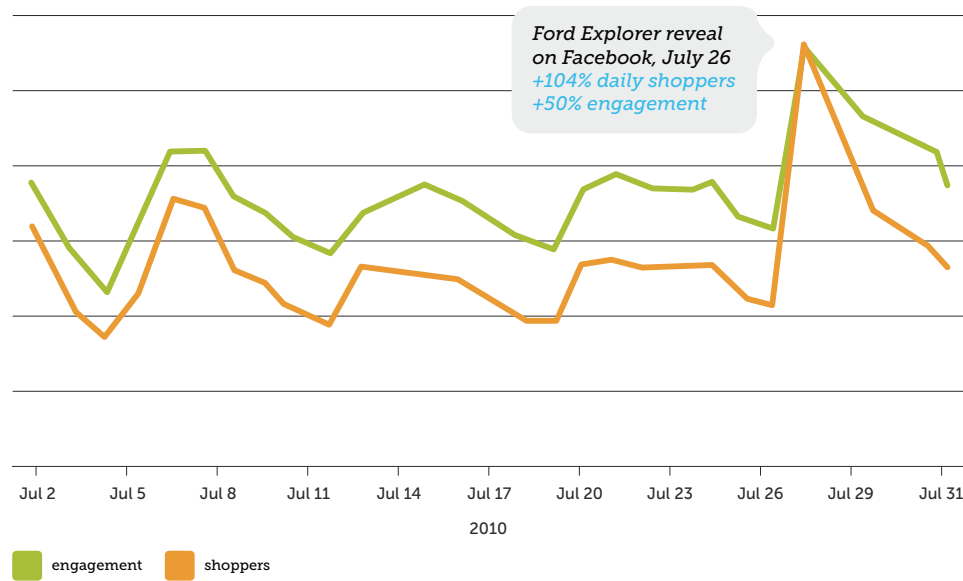
Ford took its digital media prowess to another level when it unveiled the 2011 Explorer exclusively on Facebook, a first for a vehicle reveal, which traditionally occurs at auto shows or major industry events. Not only did Ford demonstrate confidence in social media to get its message across, but the move proved highly successful in encouraging a high volume of in-market shoppers to consider the Explorer.

Daily users researching the Ford Explorer more than doubled on Jumpstart publisher sites on July 26, the day of the Facebook unveiling, compared to the average daily usage for the month of July. The tactic proved successful in driving 104 percent more people to Explorer pages on that last Monday in July and the effects were compelling as well, as Explorer rounded out the week with successive daily improvements in usage (versus the monthly average) of 66, 25, 13 and 8 percent by Friday.

FIGURE 3.4.1

Ford Explorer Daily Trend

July 2010



Explorer's growth in shopping and engagement during the Facebook reveal also led to Explorer capturing greater share of SUV shoppers by as much as 52 percent during the event and 31 percent the day after. After trailing Jeep Grand Cherokee—which also recently launched a new design for 2011—for most of July, Explorer soared ahead of it and the rest of the competition, for the remainder of the month.

The type of growth in share Explorer enjoyed from its Facebook reveal bested improvements in share of shopping that manufacturers experienced the day after running one or more 30-second Super Bowl spots. When Jumpstart analyzed the post-game results of automotive advertisers in the 2010 Super Bowl, the average share of shopping growth was only 14 percent, less than a third of Explorer's growth from its Facebook reveal.

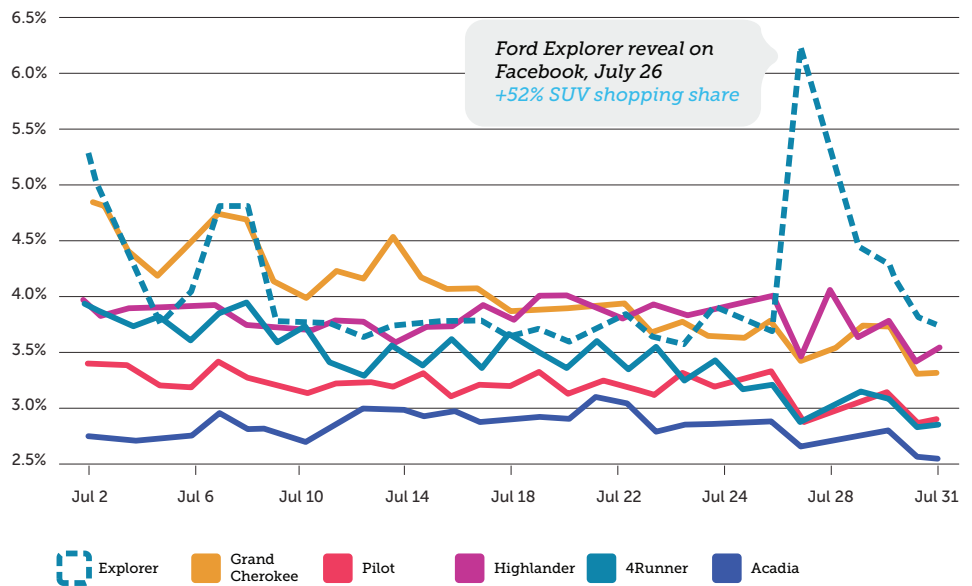
While the cost associated with the Explorer reveal program on Facebook is unknown, it was likely nowhere near the cost of even one \$2.5 million Super Bowl spot. This development demonstrates that while traditional media can be highly effective in driving consideration, a well-executed and deeply influential online program can shift intent with more immediacy.

It's a cliché to say that times are changing, but it's evident that this is a rapidly evolving industry when an automotive manufacturer chooses a social media website to unveil a new design over the conventional outlets.

FIGURE 3.4.2

Ford Explorer vs. Competing SUVs

July 2010



3.5 Car and Driver Launches Luxury Vehicle Advisor

October 19, 2011

Car and Driver and Jumpstart together have announced the launch of the Luxury Vehicle Advisor to help car shoppers make the best choice when buying a luxury vehicle. The online tool gives users the ability to prioritize luxury car attributes they find most important and then compare vehicles side-by-side based on their preferences.

The screenshot shows the Car and Driver Luxury Vehicle Advisor website. At the top, the browser address bar shows the URL <http://luxuryadvisor.caranddriver.com/>. The page features the Car and Driver logo and the title "LUXURY VEHICLE ADVISOR". Social media sharing options for Facebook (179 likes), Twitter (11 tweets), and a general share button (15) are visible.

FILTERS:

- Price Range:**
 - \$\$\$\$\$ Less than \$40,000
 - \$\$\$\$\$ \$40,000-\$70,000
 - \$\$\$\$\$ \$70,000-\$100,000
 - \$\$\$\$\$ \$100,000-\$200,000
 - \$\$\$\$\$ More than \$200,000
- Body Style:**
 - Sedan
 - Coupe
 - Convertible
 - Wagon/Hatchback
 - SUV
- Powertrain:**
 - Hybrid/Diesel

YOUR RESULTS:

Grid of vehicle results with "See more +" links:

- Audi A8 (Price Range: \$\$\$\$\$)
- Land Rover Range Rover (Price Range: \$\$\$\$\$)
- Mercedes-Benz S-class (Price Range: \$\$\$\$\$)
- Porsche Panamera (Price Range: \$\$\$\$\$)
- Lexus LX570 (Price Range: \$\$\$\$\$)
- Lexus LS (Price Range: \$\$\$\$\$)
- Porsche 911 Targa (Price Range: \$\$\$\$\$)
- Land Rover Range Rover Sport Supercharge (Price Range: \$\$\$\$\$)
- BMW 7-series (Price Range: \$\$\$\$\$)

YOUR PRIORITIES: DRAG AND DROP UP TO 3 PRIORITIES INTO THE SPACES BELOW:

Three priority slots are shown with icons and labels:

1. Craftsmanship
2. All-weather Capability
3. Handling/Ride

Additional icons for Convenience/Technology, Performance, and Safety are also visible.

The Audi A8
Luxury has progressed.
Explore the A8 >

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HEARST magazines

The *Car and Driver* Luxury Vehicle Advisor, backed by *Car and Driver's* unparalleled testing and analysis, is available at LuxuryAdvisor.CarandDriver.com and other areas of CarandDriver.com.

How Luxury Vehicle Advisor works:

- Shoppers select three of six criteria they find most important in a luxury car, choosing from craftsmanship; convenience and technology; all-weather capability; performance; handling and ride; and safety.
- Once shoppers choose their three most important criteria, they select their preferred price range, body style and powertrain.
- A total of nine luxury vehicles matching the user's criteria are displayed, with the three best matches featured at the top of the list.
- A shopping key is provided to highlight important features, including whether the vehicle is a *Car and Driver* 10Best pick, a *Car and Driver* Editors' Choice pick, or if the vehicle is available as a diesel or a hybrid.
- Shoppers can research and compare their top luxury car matches side-by-side, including analyzing price, car reviews, specs, features and options.

"Shopping for a luxury car can be daunting because of the number of characteristics that may not immediately be apparent on a ten-minute test drive," said Eddie Alterman, Editor-in-Chief of *Car and Driver*.

"Our Luxury Vehicle Advisor helps shoppers identify the ideal vehicles for them by boiling down *Car and Driver's* test results into a simple tool that allows shoppers to compare vehicles based on their priorities." —Eddie Alterman, Editor-in-Chief of *Car and Driver*.

More than 200 luxury vehicles within Luxury Vehicle Advisor are rated and scored by *Car and Driver's* editors in each of the six categories based on instrumented testing and road tests. Then, luxury cars most closely matching a shopper's criteria are assigned a dynamic score which weights the priorities chosen.

Once the results are displayed, shoppers can share their picks at Facebook, Twitter or via email, or reset their selections by choosing different priority features.

3.6 2011 Audience Shopping and Research Trends Compared to Automotive Industry Sales, Continued Growth Expected in 2012

January 29, 2012



Despite a number of catastrophic setbacks that halted production and caused supply shortages for several high-volume brands throughout the year, the industry has succeeded in closing out 2011 with a 10 percent gain in sales volume compared to 2010. As of December, U.S. light vehicle sales reached 12.7 million units, pacing at a SAAR of 12.72 from January to December, and meeting industry estimates for 12.5 "to 12.8 million units by year-end.

In 2011, the automotive industry was shaken with destruction caused by the natural disasters that devastated Asia. The earthquake and tsunami that struck Japan in March set manufacturers back on vehicle supply for a minimum of three months. Toyota and Honda were hit especially hard, with the disasters affecting parts supply and production facilities. Additionally, Toyota faced vehicle recalls that, when coupled with the disasters, resulted in losing its position as the world's largest automotive maker, with global sales dropping 6 percent. Honda also struggled with the effects of Thailand's worst flooding in over 50 years, which halted production and destroyed a factory containing 1,000 completed vehicles. Dealers are not expected to be fully restocked until March 2012. Also in 2011, Honda's top-selling vehicle in the U.S., the Civic, was under great scrutiny for the redesign of the compact version. Consequently, a vehicle that has been among the top five for years has now fallen to the bottom of the top ten cars in sales volume in the U.S.

"Car buyers remain motivated by economic factors, basing their immediate purchase decisions on price and value," says Nick Matarazzo, Jumpstart Automotive Group CEO. "But we've seen consumer optimism revealing itself with an increased demand for luxury car information and a growth in luxury car interest across the Jumpstart network."

Although natural disasters hurt many of the top manufacturers in 2011, others gained strength and emerged as stronger competitors to high-volume brands. Hyundai has been on the rise since 2008 and continued to show strong gains in sales volume and shopper interest throughout the course of 2011. As of December, Hyundai reported two vehicles in the top ten for car sales volume in the U.S., with Sonata ranking seventh with almost 226,000 units sold, and Elantra ranking tenth with over 186,000 units sold in the calendar year. Two years ago, neither of these vehicles fell in the top ten in light vehicle car sales in the U.S.

Similarly, Ford has been working its way towards the top-selling brand in the U.S. since surpassing Chevrolet in 2008 and Toyota in 2010. At year-end, Ford represents almost 16 percent share of light vehicle sales in the U.S., beating out Chevrolet by 2 percentage points and leaping four and a half points ahead of Toyota. Ford's Fusion is ranked as the third top-selling car in the U.S., while the F-Series truck and Escape SUV are the first and third-selling, respectively, in the light-truck/SUV category.

The economic outlook for 2012 could lead to another interesting year in the automotive industry. Jumpstart expects to see further growth in vehicle sales to an estimated 13.8 million units, depending on various economic factors. Employment rates and consumer confidence could both potentially have an impact on new-vehicle sales, and although there are signs of recovery from the 2008–2009 recession, the rate of recovery in the U.S. is expected to slow down. December unemployment rates dropped to 8.5 percent, nearly one whole percentage point from year-ago levels of 9.4 percent. The entire labor force, however, was also down by nearly 300,000 as reported by the U.S. Bureau of Labor Statistics. These factors combined with the volatility in crude oil and gas prices could cause consumers to hold onto their vehicles longer, consider used over new, or look to alternative fuels/technology when shopping for their next vehicle. Since the near drop-out of the U.S. automotive industry in late 2008 and 2009, many studies have pointed to consumers holding onto their vehicles longer, which begs the question of whether pent-up demand will cause a greater increase in new vehicle sales in 2012.

2011 Audience Shopping and Research Trends

Demand is continuing to grow among more fuel efficient vehicles as seen among Jumpstart audience share of vehicle segments. Alternative fuels and technology (namely hybrid and electric) saw a growth surge from 2010 to 2011, and now represent approximately 3.7 percent share of shopping on Jumpstart sites. The hybrid category alone jumped 1.25 share points, representing a 70 percent increase from 2010.

Compacts and crossover-utility vehicles (CUVs) also benefited from the value and fuel efficiency trends, with both segments seeing notable increases over the prior year with growth-rates ranging from 6 to 28 percent. Specifically, compacts and luxury CUVs have increased nearly 1 percentage point in overall share from 2010, showing that among various price points, consumers are opting for more fuel efficient vehicles. At the same time, less fuel efficient standard and luxury sport utility vehicles (SUVs) and truck segments have significantly declined. Despite a slowing economy, the luxury category is on the rise with growth in almost all luxury sub-segments. This growth surge indicates 2012 won't be completely dominated by fuel efficiency, and that there will be continued interest in design, performance and technology that is most apparent in the luxury segment. Luxury shopping growth on Jumpstart sites is largely driven by Audi, now holding an impressive 4 percent share of Jumpstart shoppers, representing a 29 percent increase from last year. This growth brings it ahead of German competitors BMW and Mercedes-Benz for the second consecutive year. Audi now leads BMW (2.8 percent) by 1.2 percentage points and Mercedes-Benz (1.7 percent) by 2.3 percentage points.

Jumpstart's analysts revealed two key but conflicting factors in shopping: more aspiration vehicles returned to the top ten lists while, simultaneously, the most popular search term on the Jumpstart network was "affordable."

"Car buyers remain motivated by economic factors, basing their immediate purchase decisions on price and value," says Nick Matarazzo, Jumpstart's CEO. "But we've seen consumer optimism revealing itself with an increased demand for luxury car information and a growth in luxury car interest across the Jumpstart network."

FIGURE 3.6.1

Share of Vehicle Category/Segment Shopping

January 2009–December 2011

Vehicle Category/Segment	CY 2009	CY 2010	% Var.	Share-Point Var.	CY 2011	% Var.	Share-Point Var.
Sedan	27.0%	26.5%	-2%	-0.54%	26.6%	0%	0.09%
Sport-Utility Vehicle (SUV)	17.4%	19.3%	11%	1.97%	16.8%	-13%	-2.60%
Luxury Sedan	11.1%	9.5%	-14%	-1.58%	9.6%	1%	0.13%
Cross-Utility Vehicle (CUV)	5.3%	6.8%	28%	1.48%	7.2%	6%	0.43%
Sports Car Convertible	3.9%	3.8%	-2%	-0.09%	5.1%	32%	1.23%
Compact	3.8%	4.0%	4%	0.15%	5.0%	24%	0.98%
Luxury CUV	4.5%	3.1%	-30%	-1.35%	4.0%	28%	0.90%
Wagon	3.4%	3.1%	-9%	-0.30%	3.9%	25%	0.78%
Large Pickup	6.1%	5.9%	-3%	-0.17%	3.8%	-36%	-2.12%
Hybrid	1.9%	1.8%	-4%	-0.08%	3.0%	70%	1.25%
Luxury SUV	2.9%	3.5%	20%	0.59%	3.0%	-13%	-0.44%
Luxury Sport	2.8%	2.6%	-8%	-0.21%	2.8%	8%	0.21%
Van	2.9%	3.1%	9%	0.26%	2.6%	-17%	-0.54%
Small Pickup	3.5%	3.4%	-2%	-0.06%	2.3%	-32%	-1.08%
Coupe	1.3%	1.3%	3%	0.04%	1.2%	-6%	-0.09%
Luxury Convertible	0.7%	0.6%	-17%	-0.12%	0.8%	22%	0.14%
Electric	0.0%	0.1%	1511%	0.08%	0.6%	590%	0.49%
Luxury Coupe	0.5%	0.5%	0%	0.00%	0.6%	21%	0.10%
Luxury Wagon	0.5%	0.4%	-14%	-0.07%	0.5%	18%	0.08%
Luxury Specialty	0.2%	0.2%	29%	0.05%	0.3%	36%	0.08%
Large Van	0.2%	0.3%	48%	0.10%	0.3%	-5%	-0.02%
Diesel	0.2%	0.0%	-82%	-0.14%	0.0%	-51%	-0.02%

FIGURE 3.6.2

Share of Brand Shopping

January 2009–December 2011

Make	CY 2009	CY 2010	% Var.	Share-Point Var.	CY 2011	% Var.	Share-Point Var.
Acura	2.3%	2.1%	-7%	-0.17%	2.1%	-1%	-0.01%
Audi	3.1%	3.1%	-1%	-0.04%	4.0%	29%	0.91%
BMW	3.2%	3.0%	-7%	-0.24%	2.8%	-6%	-0.18%
Buick	0.8%	1.1%	32%	0.27%	1.2%	7%	0.07%
Cadillac	2.0%	1.5%	-23%	-0.45%	1.4%	-4%	-0.07%
Chevrolet	10.8%	10.8%	0%	0.00%	10.5%	-3%	-0.28%
Chrysler	1.7%	1.7%	3%	0.05%	1.2%	-32%	-0.57%
Dodge	3.4%	4.1%	19%	0.64%	3.7%	-9%	-0.36%
Fiat	0.0%	0.0%	0%	0.00%	0.4%	19962%	0.38%
Ford	12.5%	12.0%	-5%	-0.57%	13.9%	16%	1.93%
GMC	2.3%	3.0%	33%	0.75%	1.7%	-43%	-1.31%
Honda	8.4%	7.9%	-5%	-0.44%	8.4%	6%	0.49%
Hyundai	3.1%	4.1%	34%	1.02%	5.0%	23%	0.95%
Infiniti	0.8%	1.0%	34%	0.26%	1.1%	7%	0.08%
Jaguar	0.4%	0.3%	-24%	-0.10%	0.5%	60%	0.19%
Jeep	2.3%	3.1%	38%	0.86%	2.6%	-16%	-0.51%
Kia	2.0%	2.5%	27%	0.53%	3.2%	27%	0.67%
Land Rover	0.3%	0.3%	5%	0.01%	0.4%	27%	0.08%
Lexus	1.5%	1.7%	16%	0.24%	1.8%	4%	0.06%
Lincoln	0.8%	0.9%	8%	0.06%	0.8%	-6%	-0.05%
Mazda	2.5%	2.6%	7%	0.16%	2.7%	4%	0.11%
Mercedes-Benz	3.9%	1.4%	-64%	-2.47%	1.7%	23%	0.32%
Mini	0.4%	0.5%	24%	0.09%	0.9%	84%	0.39%
Mitsubishi	1.8%	1.8%	-1%	-0.02%	1.5%	-18%	-0.33%
Nissan	6.4%	6.6%	3%	0.22%	5.5%	-16%	-1.08%
Porsche	1.0%	1.1%	8%	0.08%	1.2%	11%	0.12%
Ram	0.4%	0.8%	94%	0.39%	0.4%	-51%	-0.41%
Saab	0.3%	0.3%	-6%	-0.02%	0.2%	-20%	-0.06%
Scion	0.5%	0.6%	17%	0.08%	0.5%	-8%	-0.04%
Smart	0.1%	0.0%	-30%	-0.02%	0.1%	79%	0.04%
Subaru	2.0%	2.2%	13%	0.25%	2.1%	-8%	-0.19%
Suzuki	0.4%	0.6%	36%	0.16%	0.6%	-3%	-0.02%
Toyota	11.3%	11.0%	-3%	-0.35%	10.1%	-8%	-0.91%
Volkswagen	3.4%	2.9%	-14%	-0.47%	3.2%	10%	0.30%
Volvo	1.5%	1.6%	4%	0.06%	1.3%	-14%	-0.22%

Top Models in Share of Jumpstart Shoppers

When looking at specific models that hold the top ten spots for highest share of Jumpstart shoppers overall, the same vehicles have continued to appear in the top three for the past three years. Honda Civic, Honda Accord and Ford Mustang have consistently pulled in the highest volume of shoppers and continued to do so in 2011. This past year however, Mustang moved out of third rank up to first, holding onto an average of 2.6 percent of Jumpstart shoppers throughout the year.

Particularly noteworthy are the vehicles that tend to jockey for fourth, fifth and sixth positions. These positions have continuously changed over the last several years, and this past year all three spots were occupied by Ford vehicles. Many high volume vehicles such as the Impala, Camry and Corolla have been bumped down or off the list completely. Trucks have dropped in rank as well. The Silverado fell out of the top ten

and was replaced by Ford's small, fuel efficient Escape SUV. The all-new Explorer, having recently moved to a crossover platform, moved into sixth place in 2011, which is impressive considering the vehicle previously ranked at the bottom of the list in 2010 and didn't make the top ten at all in 2009. The Focus got a lot of attention in 2011 with the early release of the much-anticipated 2012 model, which was built on a new platform with new engines, interior and exterior design.

"We are seeing Ford dominate the top ten spots in share of shopping with five of their vehicles in the rankings," stated Libby Murad-Patel, Jumpstart's Senior Director of Strategic Insights. "Ford occupied only two spots in the top ten in 2009 and three spots in 2010. U.S. sales are mimicking the trends we're seeing in shopping on our sites, and that really speaks to the improvement and success of the Ford brand over the past three years."

FIGURE 3.6.3

Top Models in Share of Shoppers

January 2009–December 2011

Rank	Make	Model	2009 Avg.	Rank	Make	Model	2010 Avg.	Rank	Make	Model	2011 Avg.
1	Honda	Accord	2.29%	1	Honda	Accord	2.03%	1	Ford	Mustang	2.59%
2	Honda	Civic	2.21%	2	Honda	Civic	1.97%	2	Honda	Civic	2.05%
3	Ford	Mustang	2.12%	3	Ford	Mustang	1.94%	3	Honda	Accord	1.92%
4	Ford	F-150	2.04%	4	Ford	F-150	1.72%	4	Ford	Focus	1.71%
5	Chevrolet	Impala	1.96%	5	Toyota	Camry	1.70%	5	Ford	Escape	1.61%
6	Toyota	Camry	1.87%	6	Chevrolet	Impala	1.63%	6	Ford	Explorer	1.61%
7	Chevrolet	Silverado	1.66%	7	Chevrolet	Silverado	1.39%	7	Toyota	Camry	1.58%
8	BMW	3-Series	1.43%	8	Nissan	Altima	1.36%	8	Chevrolet	Impala	1.52%
9	Nissan	Altima	1.42%	9	Toyota	Corolla	1.29%	9	Toyota	Prius	1.48%
10	Toyota	Corolla	1.41%	10	Ford	Explorer	1.28%	10	Ford	F-150	1.33%

Compact Segment

The Ford Fiesta jumped 57 percent in share of the compact segment from 2010. This pushed competitors such as Chevrolet, Volkswagen and Kia down to the bottom of the top ten in the category. The return of the Fiat 500 spurred a lot of shopper attention in the segment as well, but fell just short of the top five in 2011. The desire for great small cars has also seeped over to brands such as Mini and Smart who, despite holding minimal share of audience, are seeing growth rates upwards of 79 percent from last year.

FIGURE 3.6.4

Top Models in Share of Shoppers: Compact

January 2010–December 2011

Make	Model	2010 Avg.	2011 Avg.	% Var.
Ford	Fiesta	7.00%	16.37%	57%
Honda	Fit	14.44%	14.30%	-1%
Nissan	Versa	7.21%	8.91%	19%
Nissan	Sentra	15.87%	8.90%	-78%
Toyota	Yaris	9.82%	7.55%	-30%

Non-Luxury Crossover-Utility Vehicle (CUV) Segment

Although the Chevrolet Equinox holds a strong margin against the next contender for the second consecutive year, Hyundai is a strong competitor and can be expected to continue gaining traction in 2012 with its two popular CUV models, the Santa Fe and Tucson. The Nissan Murano dropped by 35 percent, moving out of the top five from 2012 and now representing only 6 percent share of the category.

FIGURE 3.6.5

Top Models in Share of Shoppers: CUV

January 2010–December 2011

Make	Model	2010 Avg.	2011 Avg.	% Var.
Chevrolet	Equinox	13.55%	14.38%	6%
Hyundai	Santa Fe	7.22%	9.64%	25%
Hyundai	Tucson	8.09%	9.05%	11%
Ford	Edge	8.82%	8.34%	-6%
GMC	Acadia	7.71%	6.48%	-19%

Luxury Crossover-Utility Vehicle (CUV) Segment

Audi is the clear winner within the luxury CUV segment, with the Q5 jumping 70 percent in share from its average in 2010. Now representing nearly 20 percent of the category, Audi is almost 6 percentage points away from its nearest competitor, the Acura MDX. All other top five vehicles in the category have lost share from 2010, and only a handful of other competitors within the segment were able to grow share throughout the year. Some of those that saw growth were the Infiniti EX (up 48 percent), Lincoln MKT (up 89 percent), Mercedes-Benz GLK (up 74 percent) and Acura ZDX (up 3 percent), however all of these vehicles combined only represent approximately 9 percent of the category.

FIGURE 3.6.6

Top Models in Share of Shoppers: Luxury CUV

January 2010–December 2011

Make	Model	2010 Avg.	2011 Avg.	% Var.
Audi	Q5	5.82%	19.65%	70%
Acura	MDX	15.92%	13.92%	-14%
Buick	Enclave	15.97%	12.66%	-26%
BMW	X5	12.92%	7.79%	-66%
Cadillac	SRX	8.66%	6.68%	-30%

Non-Luxury Sedan Segment

Despite their decline in vehicle sales this year, the Honda Civic and Accord remained leaders in share of shoppers within the sedan segment in 2011 on Jumpstart sites. As the margins against competitors continue to shrink, the top five can be anticipated to look very different in 2012, and will likely include the Hyundai Elantra and Sonata. The Ford Fusion is expected to move up and become a closer contender with the Camry and Impala.

FIGURE 3.6.7

Top Models in Share of Shoppers: Non-Luxury Sedan

January 2010–December 2011

Make	Model	2010 Avg.	2011 Avg.	% Var.
Honda	Civic	7.51%	7.65%	2%
Honda	Accord	7.72%	7.26%	-6%
Ford	Focus	4.47%	6.38%	30%
Toyota	Camry	6.34%	5.94%	-7%
Chevrolet	Impala	6.11%	5.79%	-5%

Luxury Sedan Segment

Most surprising in the luxury sedan category is the activity around the Audi A4. Typically among the top of the entry luxury sedans, the A4 dropped over 2 percentage points from 2010, despite this being a strong year for Audi overall. While BMW has seen little growth in the 3-Series, it is still approximately 3.5 percentage points ahead of their nearest competitor. Larger sedans in its lineup, the 5-Series and 7-Series, have seen decreases in share that could allow competitors Audi, Acura and Mercedes-Benz to move ahead in 2012.

FIGURE 3.6.8

Top Models in Share of Shoppers: Luxury Sedan

January 2010–December 2011

Make	Model	2010 Avg.	2011 Avg.	% Var.
BMW	3-Series	11.23%	11.35%	1%
Acura	TL	7.59%	7.85%	3%
Audi	A4	9.44%	7.39%	-28%
Cadillac	CTS	5.72%	6.40%	11%
BMW	5-Series	4.80%	4.76%	-1%

Hybrid Segment

The Toyota Prius continues to lead the hybrid category in share; however, 2011 was the first year-over-year decrease it has seen since its inception. With the technology being widely adopted among competitive brands and consumers alike, competition in the category is heating up. The lineup of vehicles using hybrid methods for fuel efficiency is also causing this category to diversify heavily among vehicle classes. In the U.S. alone, there are now over thirty vehicles available in a hybrid version, and over forty that fall into the hybrid/electric/fuel-cell vehicle classification.

FIGURE 3.6.9

Top Models in Share of Shoppers: Hybrid

January 2010–December 2011

Make	Model	2010 Avg.	2011 Avg.	% Var.
Toyota	Prius	52.78%	48.59%	-9%
Ford	Escape Hybrid	13.65%	21.42%	36%
Honda	Insight	10.99%	6.57%	-67%

Electric Vehicle Segment

Although the category is small, there is an interesting duel going on between the Chevrolet Volt and Nissan Leaf. Despite the Leaf being the outright leader in shopper share in 2010, the two swapped positions in 2011 with the Volt holding 76 percent share of the electric segment. More than likely, the two vehicles will continue to compete and hold a dominant share of the segment as the category continues to grow.

FIGURE 3.6.10

Top Models in Share of Shoppers, Electric

January 2010–December 2011

Make	Model	2010 Avg.	2011 Avg.	% Var.
Chevrolet	Volt	13.29%	76.10%	83%
Nissan	Leaf	86.71%	17.10%	-407%
Tesla	Roadster	0.00%	6.60%	N/A

Notable Brand and Digital Marketing Activity

Brands heavily engaged in digital activity are realizing the fruits of their efforts. Specifically, Ford, Kia and Audi experienced success in 2011 due in part to their investment in creative and aggressive digital marketing campaigns.

In 2011, the biggest winner was Ford with a nearly 2 percentage point gain in overall share that can be attributed to the success of two very well received vehicles: the 2011 Fiesta and the Focus. Ford now represents almost 14 percent share of Jumpstart shoppers, with a 3.4 percentage point gain on Chevrolet (10.5 percent) and a 3.8 percentage point gain on Toyota (10.1 percent).

To no surprise, Ford has been touted for the past three years for its product and marketing efforts that have helped it grow its overall share of the U.S. market and gain the attention of a wide generation of car shoppers. The Fiesta Movement was a lifestyle play that relied on viral marketing and interactive media campaigns with social elements to generate buzz and interest in the vehicle. Even before hitting dealer lots, the Fiesta was a highly anticipated vehicle and has grown to the very top of consideration in the compact segment. In its pre-launch/launch year, Fiesta was already holding 7 percent share of compact shoppers, and jumped an astounding 57 percent in 2011 to the top rank in compact vehicles, holding over 16 percent share of the category.

Kia has grown nearly 30 percent share in shopper interest annually for the past two years and now holds the 10th highest share of shoppers on Jumpstart sites, with 2011 sales approximately 34 percent above 2010 units. The brand's success can be attributed to their increased digital investment during a time when many others cut back. Through their highly effective Urban Hamster campaigns, which spanned across digital and video, Kia and parent company Hyundai were able to increase awareness, consideration and eventually sales when many other brands were seeing declines in a tough economy.

Audi has moved up significantly in shopper consideration, and is the only luxury brand ranked in the top ten in terms of share of shoppers, holding 4 percent share at an annual growth rate of 29 percent over 2010.

It has gained the attention of its German luxury counterparts by bringing to market performance, quality, convenience and style—features that resonate with both younger and older car buying demographics. Audi utilized branding through both traditional and interactive outlets to drive interest and consideration for its vehicles with viral campaigns on TV and YouTube such as “Stolen Audi” and “Meet the Beckers.” Super Bowl spots such as last year’s “Luxury Prison” have revealed a fun, comical side to the brand.

Continued Growth Expected in 2012

2011 was an unexpected year of growth and 2012 has the potential to be even better for the automotive industry, due in part to pent-up demand as a result of consumers holding onto their vehicles longer and also in part to the 2011 depletion of inventory of many high-volume, ever-popular Asian brands—inventory depletions that may have delayed new vehicle purchases into 2012. On the other hand, the economic state is still in recovery and the automotive industry could be volatile if there are any sudden shifts in employment rates, oil prices or consumer confidence.

“We expect to see continued growth in shopping activity among the compact segment, as there are a number of new vehicles on the market that are high quality with technology and convenience factors built in,” said Murad-Patel of the year ahead. “Many of these new vehicles are also fuel efficient, so they can be expected to resonate with a very broad demographic.”

Price is not expected to be the number one driver of vehicle decision-making this year. Although it will still be important, consumers who have held onto vehicles longer will likely have more money to spend on their next vehicle, which could afford them a step up from their last purchase. This trend could also lead into further growth of the luxury segment, which was already on the rise in 2011.

The combination of four consecutive quarters of SAAR topping 13 million, several highly anticipated 2012 vehicle launches, and the eagerness and optimism of consumers could result in roughly 13.8 million new vehicles sold in 2012.

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