



LOOKING
BACK
/
LOOKING
AHEAD

2016 – 2017

INDUSTRY TRENDS AND INSIGHTS

“Creating an optimal consumer experience continues to be a top priority for us, as it does for our publishing partners.”

No doubt 2016 will go down as the year the industry—and the digital advertising that drives it—truly had to fight disruption. From auto brands and technology companies forming new partnerships to the car becoming the newest platform for content consumption, the industry evolved by leaps and bounds this year. And while it's changing fast, we're also preparing for a slowdown in new car sales after consecutive years of growth since 2010.

It was certainly a historic year for Jumpstart. We became part of Hearst Autos, a new, auto-centric division of Hearst; unveiled a new name and logo; partnered with Autolist.com, the mobile-first, data-driven marketplace; strengthened our tier 3 footprint; and continued to expand our business in Canada. In the midst of all this change, we have been refining, simplifying, and strengthening our offerings, including:

- » More **flexible packaging** options to enable our clients to better align messages across tiers and screens
- » Expanded **native offerings** within model pages, including video
- » **Custom content** development
- » Increased investment in **market research** and **data capabilities** to inform product and marketing solutions

Creating an optimal consumer experience also continues to be a top priority for us, as it does for our publishing partners. From improved navigation and expanded reviews, rankings, and analysis to more robust pricing tools, our publishers remain committed to improving site design to help guide consumers through their next vehicle purchase (turn to page 80 to hear more about what our publishers have in store for 2017).

Each year, we study the shopping behavior of our diverse audience of in-market shoppers to understand how people are researching their next car purchase and to reveal which segments and vehicles are maintaining, gaining, and losing traction. In addition to these marketplace insights, this year's book includes an overview of U.S. and Canadian regional shopping trends (pages 34, 64), a look at brand loyalty (page 84), an analysis of how our newest native products are performing (page 70), and more.

Lastly, I'm proud to now serve as not only the chief executive officer of Jumpstart Automotive Media but also the president of Hearst Autos. This new division brings together industry-leading automotive consumer and business-to-business brands, with the goal of helping marketers engage with auto shoppers from inspiration to purchase. As part of this new division, we are working more closely than ever with *Car and Driver* and its custom content studio, the blend line™, and are looking forward to some exciting developments in the year ahead.

Here's to disrupting in 2017 and having another record year!



Nick Matarazzo

DIGITAL AUTOMOTIVE MARKETING

SCALE AND PERFORMANCE
CREATIVE SOLUTIONS
IN-DEPTH INSIGHTS

Exclusive
Access
To One Of
The Largest,
High-Performing
Audiences
Of In-Market
Shoppers And
Enthusiasts

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2016 ended with 17.5 million units sold—
setting another record year for new vehicle sales.

The new car market continued to be fueled by new entries, low gas prices, high incentives, and easy availability of credit. The light truck category (SUVs, CUVs, vans, and trucks) outsold cars by 3.7 million units, grabbing 61% share of the market—a 7% increase from 2015. Luxury sales held steady with 12% share (2.1 million vehicles), but is expected to grow to 2.5 million by 2020.

* Shopper interest data from Jumpstart Internal Analytics, January 2015 – December 2016.
Sales data from Wards Auto, January 2015 – December 2016.




U.S. Audience And Data

Jumpstart is:

Car and Driver, U.S. News Best Cars, J.D. Power Cars, NADAguides, Autoweek.com, Autobytel, Autolist.com, Daily News Autos, LeftLaneNews.com, CarSoup, and CarBuzz.

THE JUMPSTART AUDIENCE 25 MILLION STRONG

2015 – 2016 Jumpstart Visitors

	% Change	2016	2015
 Desktop	-12%	37%	43%
 Smartphone	+14%	56%	49%
 Tablet	-18%	7%	9%

Smartphones And Tablets

52% iPhone
48% Android Phone

71% iPad
29% Android Tablet






The number of shoppers visiting Jumpstart's sites exclusively from a desktop dropped 24% from 2015 (39% vs. 30%)



Apple's iPhone surpassed Android as the top smartphone device for the first time in 2016

AHEAD OF THE COMPETITION

	 TOTAL MULTI-PLATFORM UNIQUE VISITORS (M)	 TOTAL PAGES VIEWED (M)	 TOTAL MINUTES (M)
Jumpstart	24.8	537	392
Autotrader	17.9	188	170
Autoblog	9.7	48	38
KBB.com	9.0	219	80
Cars.com	8.7	147	147
Edmunds.com	7.9	67	47
TEN Automotive (In-Market)	7.0	31	45
MSN Autos	6.6	143	170
TrueCar	2.1	17	12

With a heavy focus on growing audience engagement and building the best consumer experience, average minutes per visit on Jumpstart's sites grew by 11% in 2016—the highest growth among its core competitors

* comScore Media Metrix Multi-Platform, Q4 2015 And Q4 2016

* comScore Media Metrix Multi-Platform, Q4 2016

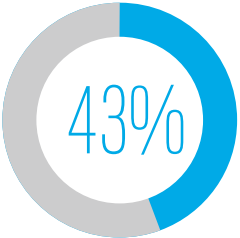

ABOUT OUR SHOPPERS

57% 25-54 YEARS
34% 18-34 YEARS

With more average views per visitor than all its competitors, Jumpstart has the most engaged Millennial audience

38%  \$100K+ HOUSEHOLD INCOME

The percentage of Jumpstart's audience that is considered affluent grew 22% in 2016

 43%  HAVE CHILDREN

Shoppers with children has remained consistent since 2015

Audience: Men And Women

  60%

  40%

Jumpstart had a 10% growth in women visiting its portfolio of sites in 2016

* comScore Media Metrix Multi-Platform, Q4 2016

HOW SHOPPERS ARE REACHING OUR PORTFOLIO

New And Returning Visitors

New  54%

Returning  46%

Traffic Sources

Search
Landing on Jumpstart pages through natural (organic) search (non-sponsored or non-paid) 60%

Direct
Typing the exact URL for one of our sites into the browser 19%

Referral¹
Coming to Jumpstart from another site 8%

Social
Discovering Jumpstart through social platforms 5%

Paid Search
Landing on Jumpstart pages through a sponsored search link 3%

* Google Analytics Premium, Q4 2016

1. 2015 referral traffic was overstated due to misclassifications in Google Analytics and was corrected in 2016

THE 2016 JUMPSTART AUTO SHOPPING PATHS



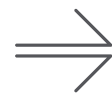
AUDIENCE

These common paths show how visitors navigate through the auto shopping process and how they work through the many layers of information that is available to them. Ultimately, most paths will involve researching a specific vehicle (vehicle detail pages) within the first three interactions.



HOMEPAGE

62%



One in two shoppers who enter our sites through the homepage end up viewing a vehicle detail page within the first three interactions



RESEARCH LANDING PAGE

50%



VEHICLE DETAIL PAGES



SHOPPING



LISTINGS

46%



Among visitors who enter our sites directly on listings pages, nearly 50% return to the homepage to reset their search criteria before moving to a vehicle detail page to conduct more research



HOMEPAGE

24%

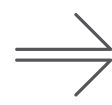


VEHICLE DETAIL PAGES



RANKINGS

64%



Vehicle rankings often drive shoppers into vehicle detail pages to allow for more comprehensive research, and then to photo galleries to help validate the vehicle they have their eye on



VEHICLE DETAIL PAGES

19%



PHOTO GALLERY



AUTO SHOW

46%



Events such as auto shows are great ways to capture visitor interest. One in five people who come to our sites to view auto show coverage end up viewing a vehicle detail page or finance page within three interactions.

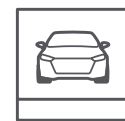


PHOTO GALLERY

20%



VEHICLE DETAIL PAGES OR FINANCE PAGES



VEHICLE DETAIL PAGES

31%



One-third of people who come to our sites with a specific vehicle in mind (typically from search) rely on photo galleries as part of the research process

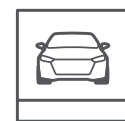


PHOTO GALLERY

24%



VEHICLE DETAIL PAGES

* Internal Analytics, Q4 2016
Sample size equals 6.9 million visitors

WHERE WE LANDED

How Jumpstart's 2016 Predictions Played Out

Prediction #1: Auto Companies Will Continue To Surprise Us Through Innovation

Despite technology companies' extensive R&D, first-rate talent, and big budgets, we learned in 2016 that auto manufacturers really are better at building cars. Go figure. But technology-focused efforts did not wane. GM acquired a Silicon Valley autonomous driving startup and invested in Lyft; this purchase will result in Lyft's first driverless fleet. In August, Ford promised it would have a fully automated driverless vehicle ready for commercial

ridesharing by 2021, and Volvo partnered with Uber in key markets across the country to test driverless technology. Last year, there were also several autonomous driving-related announcements that will strengthen Detroit's footprint, including the designation of a former GM plant in Michigan as a state-of-the-art self-driving testing facility and news that Uber plans to open up a Detroit facility to collaborate more closely with automakers.

Prediction #2: Building And Maintaining Customer Loyalty Will Be A Challenge

For the past two years, we've partnered with research firm Ipsos Connect for a series of consumer studies and have continued to hear how brand experiences are key to winning customers over. While many automakers—especially luxury brands—have been doing this for years (e.g., with driving academies and off-road events and by inviting consumers to participate in vehicle design research), in 2016 we saw more automakers make greater investments in

bringing their brands to life. For example, nameplates such as Ford and Infiniti started to use AR and VR to create test-drive and showroom experiences. These immersive experiences attract new customers and help maintain loyalty by allowing them to be part of the brand story, rather than spectators.

Because loyalty remains such an interesting topic, we've delved more deeply into the subject this year. Check out our editorial on page 84.

Prediction #3: People Will Fall In Love With Driving—All Over Again

The automobile is arguably one of the most technologically innovative products—in one of the fastest-evolving industries. And, technology advancements aside, the romantic *idea* of the car is stronger than ever. From the popularity of long-standing TV hits like *Comedians In Cars Getting Coffee*, *Jay Leno's Garage*, *Top Gear*, and 2016 entrant *Grand Tour* to the renewed interest in analog (e.g., Amazon's opening a brick-and-mortar store, the onslaught of cord-cutters, and the rise of turntables) to online-research behavior, America is clearly still very

much in love with cars and the nostalgia that comes with them. In 2016, consumers continued to heavily research Ford Mustang, Chevrolet Camaro and Corvette, and Dodge Challenger across Jumpstart's sites. These cars remain within Jumpstart's top 25, if not top 10, models that people are looking at. Whether or not this interest adds up to year-over-year sales increases, people are aspiring to the power, the sexiness, and the feeling of freedom cars evoke. And that's a beautiful thing.

To stay up to date on all Jumpstart news, visit jumpstartauto.com/insights



Image Source: google.com



Image Source: ford.com



Image Source: subaru.com

Top 10 BRANDS

Share Of U.S. Light Vehicle Sales

Rank	Brand	% Change	2016 Sales (M)
1	FORD	-1%	2.42
	2016	13.9%	
	2015	14.1%	
2	CHEVROLET	-2%	2.10
	2016	12.0%	
	2015	12.2%	
3	TOYOTA	-2%	2.07
	2016	11.8%	
	2015	12.1%	
4	HONDA	+4%	1.48
	2016	8.5%	
	2015	8.1%	
5	NISSAN	+5%	1.43
	2016	8.2%	
	2015	7.8%	
6	JEEP	+7%	0.93
	2016	5.3%	
	2015	5.0%	
7	HYUNDAI	0%	0.77
	2016	4.4%	
	2015	4.4%	
8	KIA	+3%	0.65
	2016	3.7%	
	2015	3.6%	
9	SUBARU	+5%	0.62
	2016	3.5%	
	2015	3.4%	
10	GMC	-3%	0.55
	2016	3.1%	
	2015	3.2%	

Top 10 BRANDS

Highest Growth In U.S. Light Vehicle Sales

Rank	Brand	% Growth	2016 Sales (M)
1	JAGUAR	+115%	0.03
2	TESLA	+72%	0.03
3	VOLVO	+17%	0.08
4	LINCOLN	+10%	0.11
5	RAM	+9%	0.54
6	JEEP	+7%	0.93
7	SUBARU	+5%	0.62
8	NISSAN	+5%	1.43
9	PORSCHE	+4%	0.05
10	HONDA	+4%	1.48

* Sales data from Wards Auto, January 2015 – December 2016

Top 10 BRANDS

Share Of Shopper Interest

Rank	Brand	% Change	2016 Sales (M)
1	CHEVROLET	-2%	2.10
	2016	9.7%	
	2015	10.0%	
2	FORD	-13%	2.42
	2016	8.7%	
	2015	10.0%	
3	TOYOTA	-13%	2.07
	2016	6.8%	
	2015	7.8%	
4	HONDA	+13%	1.48
	2016	6.6%	
	2015	5.9%	
5	NISSAN	-5%	1.43
	2016	5.8%	
	2015	6.1%	
6	MAZDA	+37%	0.30
	2016	4.9%	
	2015	3.6%	
7	BMW	-7%	0.31
	2016	4.3%	
	2015	4.6%	
8	AUDI	0%	0.21
	2016	4.2%	
	2015	4.2%	
9	JEEP	+1%	0.93
	2016	4.0%	
	2015	4.0%	
10	MERCEDES-BENZ	+28%	0.37
	2016	3.8%	
	2015	3.0%	

Top 10 BRANDS

Highest Growth In Shopper Interest

Rank	Brand	% Growth	2016 Sales (M)
1	JAGUAR	+50%	0.03
2	FIAT	+45%	0.03
3	SMART	+44%	0.01
4	MAZDA	+37%	0.30
5	VOLVO	+36%	0.08
6	INFINITI	+29%	0.14
7	MERCEDES-BENZ	+28%	0.37
8	TESLA	+25%	0.03
9	BUICK	+23%	0.23
10	LINCOLN	+19%	0.11

* Jumpstart Internal Analytics, January 2015 – December 2016
Sales data from Wards Auto, January – December 2016













Top 10 VEHICLES Share Of Shopper Interest

	2016 Ranking	Share	Sales (M)
1	Ford Mustang	1.3%	0.11
2	Honda Civic	1.2%	0.37
3	Chevrolet Camaro	1.1%	0.07
4	Jeep Wrangler	1.1%	0.19
5	Ford F-150	1.1%	0.81
6	Chevrolet Corvette	1.0%	0.03
7	Mazda CX-5	1.0%	0.11
8	Honda CR-V	0.9%	0.36
9	Honda Pilot	0.9%	0.12
10	Honda Accord	0.9%	0.35

	2015 Ranking	Share	Sales (M)
1	Ford Mustang	1.8%	0.12
2	Ford F-150	1.3%	0.77
3	Jeep Wrangler	1.2%	0.20
4	Chevrolet Camaro	1.2%	0.08
5	Chevrolet Silverado 1500	1.1%	0.60
6	Chevrolet Corvette	1.1%	0.03
7	Toyota Tacoma	1.0%	0.18
8	Honda Civic	1.0%	0.34
9	Jeep Grand Cherokee	1.0%	0.20
10	Honda Accord	0.9%	0.36

BODY STYLES

Share Of Interest

Body Style	2016	% Change 2015 – 2016
Luxury 	35.2%	+7%
Non-Luxury 	64.8%	-4%
SUV/CUV 	28.7%	+4%
Sedan 	23.5%	-4%
Sport 	16.4%	0%
Truck 	9.6%	-11%
Coupe 	4.3%	+5%
Hatchback/Wagon 	4.2%	+10%
Performance 	4.0%	-3%
Compact 	3.5%	+5%
Van 	3.3%	+2%
Alternative Fuel 	2.5%	+13%

* Jumpstart Internal Analytics, January 2015 – December 2016
Sales data from Wards Auto, January 2015 – December 2016

* Jumpstart Internal Analytics, January 2015 – December 2016

SHARE OF SHOPPER INTEREST AND SALES

Automotive Brands

BRAND	SHARE OF SHOPPER INTEREST		SHARE OF LIGHT VEHICLE SALES		2016 SALES (M)
	2016	% CHANGE 2015 – 2016	2016	% CHANGE 2015 – 2016	
Chevrolet	9.7%	-2%	12.0%	-2%	2.10
Ford	8.7%	-13%	13.9%	-1%	2.42
Toyota	6.8%	-13%	11.8%	-2%	2.07
Honda	6.6%	+13%	8.5%	+4%	1.48
Nissan	5.8%	-5%	8.2%	+5%	1.43
Mazda	4.9%	+37%	1.7%	-7%	0.30
BMW	4.3%	-7%	1.8%	-10%	0.31
Audi	4.2%	0%	1.2%	+3%	0.21
Jeep	4.0%	+1%	5.3%	+7%	0.93
Mercedes-Benz	3.8%	+28%	2.1%	0%	0.37
Dodge	3.4%	-10%	2.9%	-3%	0.51
Subaru	3.2%	-18%	3.5%	+5%	0.62
GMC	2.9%	-13%	3.1%	-3%	0.55
Hyundai	2.8%	+14%	4.4%	0%	0.77
Kia	2.6%	+11%	3.7%	+3%	0.65
Volkswagen	2.5%	-25%	1.8%	-8%	0.32
Porsche	2.2%	-1%	0.3%	+4%	0.05
Cadillac	2.2%	+13%	1.0%	-3%	0.17

BRAND	SHARE OF SHOPPER INTEREST		SHARE OF LIGHT VEHICLE SALES		2016 SALES (M)
	2016	% CHANGE 2015 – 2016	2016	% CHANGE 2015 – 2016	
Lexus	2.0%	-9%	1.9%	-4%	0.33
Acura	1.9%	-8%	0.9%	-9%	0.16
Land Rover	1.9%	+9%	0.4%	+4%	0.07
Buick	1.7%	+23%	1.3%	+2%	0.23
Infiniti	1.6%	+29%	0.8%	+3%	0.14
Volvo	1.4%	+36%	0.5%	+17%	0.08
RAM	1.3%	-17%	3.1%	+9%	0.54
Lincoln	1.2%	+19%	0.6%	+10%	0.11
Chrysler	1.1%	+13%	1.4%	-27%	0.24
Jaguar	1.0%	+50%	0.2%	+115%	0.03
Mitsubishi	1.0%	-2%	0.6%	+1%	0.10
FIAT	0.9%	+45%	0.2%	-21%	0.03
Scion ¹	0.8%	+6%	0.3%	-9%	0.05
Tesla	0.5%	+25%	0.2%	+72%	0.03
MINI	0.4%	-38%	0.3%	-11%	0.05
Alfa Romeo	0.3%	+4%	0.0%	-21%	0.00
Genesis	0.2%	New Entry	0.0%	New Entry	0.01
smart	0.2%	+44%	0.0%	-17%	0.01

* Jumpstart Internal Analytics, January 2015 – December 2016
Sales data from Wards Auto, January 2015 – December 2016

1. Sales and shopper interest data will be reported under Toyota in 2017



TOP

By The Numbers CARS

Car sales declined 9% in 2016, falling below 7 million units and dropping to 39% share of market. Two factors driving this trend are high consumer demand for CUVs and SUVs, and gas

prices remaining low. One thing that has helped keep car sales from dropping further is fleet and rental purchases, which are typically recycling vehicles after one to two years.

Non-Luxury Cars

When looking at share of sales among non-luxury cars, smaller, more compact vehicles saw some success in 2016 with growth of up to 10%. Honda Civic entered into the top 3 cars, knocking Toyota Corolla and Honda Accord back one spot each. Toyota Camry remained the top selling car in 2016, and despite both sales and shopper interest declining, we expect both to jump back up in 2017 with its redesign. Chevrolet Malibu saw the largest increase in sales among the top 10 cars in 2016, success from its 2016 model year redesign (Malibu's audience on Jumpstart also grew 54%). Chevrolet also continued its momentum in the compact space: Spark, Sonic, and Cruze all saw growth within their respective segments for the second consecutive year. But Hyundai is a brand to watch; neither Accent nor Elantra ranked in the top 5 of their segments last year, but grew 19% and 27% in 2016, respectively.

Luxury Cars

Among the luxury car segments, share of larger luxury sedan sales grew 7% from 2015 to 2016, and shopper interest for midsize and full-size luxury sedans grew by more than 10%. Mercedes-Benz C-Class and BMW 3-Series remained the top-selling luxury cars, although sales volumes and shopper interest both declined.

For 2017, we're keeping our eyes on the new Lincoln Continental and Volvo S90 in the midsize luxury sedan segment, as the two captured a combined 10% share in 2016. And in a crowded full-size luxury sedan category (23 competitors), Cadillac CT6, and Genesis G90 have both already risen to rank within the top 10 in the segment.

* Shopper interest data from Jumpstart Internal Analytics, January 2015 – December 2016.
Sales data from Wards Auto, January 2015 – December 2016.



SUBCOMPACT CARS

	% Change		
1 Ford Fiesta	2016 12.4%	2015 13.2%	-6%
2 Honda Fit	2016 9.5%	2015 11.6%	-18%
3 FIAT 500	2016 7.6%	2015 6.7%	+13%
4 Chevrolet Spark	2016 7.4%	2015 5.7%	+31%
5 Nissan Versa	2016 7.2%	2015 6.5%	+11%



COMPACT CARS

	% Change		
1 Honda Civic	2016 18.8%	2015 13.6%	+38%
2 Mazda Mazda3	2016 13.3%	2015 9.8%	+36%
3 Subaru Impreza	2016 7.3%	2015 7.6%	-4%
4 Chevrolet Cruze	2016 7.1%	2015 6.9%	+3%
5 Toyota Corolla	2016 6.3%	2015 7.0%	-10%



LUXURY SPORTS CARS

	% Change		
1 Chevrolet Corvette	2016 38.3%	2015 35.7%	+7%
2 Porsche 718 Boxster	2016 9.7%	2015 6.5%	+49%
3 Porsche 718 Cayman	2016 8.1%	2015 10.0%	-19%
4 Jaguar F-Type	2016 7.1%	2015 6.2%	+13%
5 BMW M4	2016 7.0%	2015 6.8%	+3%



ENTRY LUXURY SEDANS

	% Change		
1 BMW 3-Series	2016 13.2%	2015 14.3%	-8%
2 Audi A4	2016 9.5%	2015 8.3%	+15%
3 Audi A3	2016 8.4%	2015 8.9%	-6%
4 Volvo S60	2016 7.2%	2015 6.1%	+17%
5 Infiniti Q50	2016 6.9%	2015 5.1%	+36%



MIDSIZE SEDANS

	% Change		
1 Honda Accord	2016 16.6%	2015 17.3%	-4%
2 Toyota Camry	2016 10.7%	2015 11.5%	-7%
3 Chevrolet Malibu	2016 9.9%	2015 6.5%	+54%
4 Mazda Mazda6	2016 9.5%	2015 7.6%	+25%
5 Ford Fusion	2016 8.1%	2015 8.1%	0%



FULL-SIZE SEDANS

	% Change		
1 Dodge Charger	2016 23.5%	2015 25.0%	-6%
2 Chevrolet Impala	2016 17.4%	2015 15.8%	+10%
3 Chrysler 300	2016 14.1%	2015 14.2%	0%
4 Nissan Maxima	2016 10.5%	2015 13.6%	-23%
5 Buick LaCrosse	2016 10.1%	2015 6.7%	+50%



MIDSIZE LUXURY SEDANS

	% Change		
1 Mercedes-Benz C-Class	2016 12.3%	2015 13.6%	-9%
2 Mercedes-Benz E-Class	2016 12.3%	2015 6.4%	+92%
3 Cadillac CTS	2016 11.0%	2015 17.2%	-36%
4 Hyundai Genesis	2016 9.1%	2015 9.5%	-5%
5 BMW 5-Series	2016 8.4%	2015 9.9%	-16%



FULL-SIZE LUXURY SEDANS

	% Change		
1 Tesla Model S	2016 13.6%	2015 17.6%	-22%
2 BMW 7-Series	2016 11.4%	2015 11.8%	-3%
3 Porsche Panamera	2016 11.2%	2015 9.3%	+20%
4 Mercedes-Benz S-Class	2016 10.9%	2015 9.3%	+17%
5 Cadillac CT6	2016 10.4%	2015 4.8%	+117%

* Jumpstart Internal Analytics, January 2015 – December 2016

* Jumpstart Internal Analytics, January 2015 – December 2016



TOP

By The Numbers SUVs/CUVs

Collectively, SUV/CUV sales topped car sales again in 2016 and accounted for 40% of all light vehicles sold. CUV sales continued their growth momentum from 2015, with four times the sales of SUVs and grabbing another 8% in share. Still, SUVs were up 6% from 2015.

When comparing luxury and non-luxury segments, opposite forces were occurring. While interest in smaller vehicles grew among non-luxury shoppers, interest in larger vehicles grew among luxury shoppers.

Non-Luxury SUVs/CUVs

Small CUV sales grew 26% compared to last year—the largest increase among non-luxury segments. On Jumpstart sites, shopper interest in subcompact and compact SUVs/CUVs grew by more than 10% each. Meanwhile, the midsize SUV/CUV segment and the large SUV segment declined in shopper interest, and the compact segment took over as the number one segment in 2016.

On a brand level, Honda chipped away at Jeep's stronghold. Similar to 2015, Honda CR-V ranked #1 in sales, and the HR-V, CR-V, and Pilot all saw growth in share within their respective segments. The HR-V knocked Jeep Renegade down from the top spot, and Pilot moved into the number one spot replacing Jeep Grand Cherokee, which held the top spot in 2015.

Mazda is a brand that we're watching closely as it had a big year among its SUV/CUV lineup. The CX-3, CX-5, and CX-9 all saw interest growth of more than 40%, and CX-3 and CX-5 now rank within the top 3 in their segments. CX-9 is working its way into the top 5 as well and could very well be there in 2017.

Luxury SUVs/CUVs

In alignment with Jumpstart's shopper interest, larger luxury vehicles gained popularity in 2016 in sales volume. The midsize and full-size luxury SUV/CUV segments specifically saw 25% and 13% growth in shopping on Jumpstart sites, respectively.

Lexus and Acura remained dominant forces. The Lexus RX and NX ranked first and 3rd and Acura's MDX and RDX ranked 2nd and 4th in their respective segments. The midsize luxury SUV/CUV space will be an interesting segment to watch given that the top 4 vehicles suffered decreases in share as new vehicle introductions stole shopper attention. The Mercedes-Benz GLC-Class, Jaguar F-Pace, and Cadillac XT5 accounted for nearly one-fifth of all midsize luxury SUV/CUV shoppers in 2016.

Mercedes-Benz has been and continues to be a brand to watch as the new GLC and GLE saw the most growth in sales among the top 10 luxury vehicles and also posted double-digit increases in Jumpstart shopper interest. And with its expanding lineup, Mercedes-Benz has been able to steal share away from the competition.

* Shopper interest data from Jumpstart Internal Analytics, January 2015 – December 2016.
Sales data from Wards Auto, January 2015 – December 2016.



SUBCOMPACT SUVs/CUVs

Rank	Model	2016	2015	% Change
1	Jeep Renegade	19.0%	19.3%	-1%
2	Honda HR-V	17.1%	15.5%	+11%
3	Mazda CX-3	15.5%	10.2%	+52%
4	Chevrolet Trax	12.9%	11.6%	+11%
5	Buick Encore	11.8%	14.1%	-16%



COMPACT SUVs/CUVs

Rank	Model	2016	2015	% Change
1	Jeep Wrangler	11.4%	13.9%	-18%
2	Mazda CX-5	10.0%	6.7%	+49%
3	Honda CR-V	9.5%	7.3%	+29%
4	Ford Escape	7.0%	6.1%	+13%
5	Subaru Forester	5.9%	8.1%	-27%



COMPACT LUXURY SUVs/CUVs

Rank	Model	2016	2015	% Change
1	BMW X1	20.4%	18.2%	+12%
2	Lexus NX	14.7%	14.0%	+5%
3	Acura RDX	13.4%	15.6%	-14%
4	Mercedes-Benz GLA-Class	11.4%	10.0%	+14%
5	Land Rover Range Rover Evoque	9.9%	12.8%	-22%



MIDSIZE LUXURY SUVs/CUVs

Rank	Model	2016	2015	% Change
1	Lexus RX	10.8%	16.0%	-32%
2	Audi Q5	10.4%	14.2%	-27%
3	BMW X3	8.1%	12.0%	-32%
4	Porsche Macan S	7.6%	8.1%	-6%
5	Mercedes-Benz GLC-Class	7.6%	1.4%	+450%



MIDSIZE SUVs/CUVs

Rank	Model	2016	2015	% Change
1	Honda Pilot	8.1%	7.7%	+5%
2	Toyota Highlander	8.0%	7.1%	+13%
3	Jeep Grand Cherokee	7.9%	8.6%	-9%
4	Dodge Durango	7.2%	7.1%	+2%
5	Ford Explorer	6.8%	7.1%	-4%



LARGE SUVs

Rank	Model	2016	2015	% Change
1	Chevrolet Tahoe	19.8%	24.6%	-20%
2	Ford Expedition	16.7%	16.1%	+4%
3	Nissan Armada	14.4%	8.0%	+81%
4	Chevrolet Suburban	14.3%	15.0%	-5%
5	GMC Yukon	13.0%	17.7%	-27%



FULL-SIZE LUXURY SUVs/CUVs

Rank	Model	2016	2015	% Change
1	Acura MDX	14.6%	17.3%	-15%
2	Volvo XC90	11.2%	8.0%	+41%
3	Audi Q7	10.7%	11.1%	-4%
4	BMW X5	10.3%	12.7%	-19%
5	Land Rover Range Rover Sport	7.8%	6.2%	+27%



LARGE LUXURY SUVs

Rank	Model	2016	2015	% Change
1	Land Rover Range Rover	17.9%	17.5%	+2%
2	Cadillac Escalade	12.2%	13.9%	-12%
3	Mercedes-Benz GL-Class	11.5%	13.7%	-16%
4	Lincoln Navigator	10.9%	9.6%	+14%
5	Toyota Land Cruiser	9.3%	10.4%	-10%

* Jumpstart Internal Analytics, January 2015 – December 2016

* Jumpstart Internal Analytics, January 2015 – December 2016

TOP



By The Numbers

TRUCKS AND VANS

Trucks

Trucks accounted for 15% of light vehicle sales, up 6% from 2015. And while both small and large pickup sales increased, the overall growth in trucks was largely driven by small pickups (+25%). The top 3 selling trucks remained unchanged from 2015 (Ford F-150, Chevrolet Silverado 1500, and RAM 1500), but Nissan Titan had the strongest growth in sales (+80% in sales volume, +67% in Jumpstart shopper interest).

Chevrolet Colorado and GMC Canyon continued their rise among the small pickups as sales grew 29% and 25%, respectively. Honda Ridgeline, thanks in part to its redesign, also had a successful year with sales and Jumpstart shopper interest growing by double-digits.

Overall, Jumpstart shopper interest in trucks started to move in a different direction than sales in 2016. The body style overall dropped by 11% and the small/midsize segment only gained 1% in shopper interest, despite sales being up 25%. Interest in full-size pickup trucks also dropped 19% as the top 3 trucks all struggled. Similar to the Ridgeline, Nissan Titan's redesign helped boost interest and move Titan into the top 5, surpassing GMC Sierra 1500 and Toyota Tundra.

Vans

Vans accounted for 6% of sales (up 8% from 2015) and growth in large cargo and passenger vans (+14%) outpaced the growth of small or passenger vans (+6%). Toyota Sienna remained the top selling van in 2016. And Dodge Grand Caravan saw significant growth of 26%, surpassing Honda Odyssey and coming within 113 units of Toyota Sienna.

Among Jumpstart shoppers, van interest grew 2%, largely driven by the Mercedes-Benz Metris and the new Chrysler Pacifica. In less than a year of being back on the market, Chrysler Pacifica has already captured 16% of the minivan segment and is closing in on Toyota Sienna, which currently ranks 2nd in the category.

In the large cargo/passenger van segments, Mercedes-Benz Sprinter and Ford Transit further expanded their dominance as share grew 18% and 27%, respectively.

* Shopper interest data from Jumpstart Internal Analytics, January 2015 – December 2016.
Sales data from Wards Auto, January 2015 – December 2016.



MIDSIZE PICKUP TRUCKS

			% Change
1	Toyota Tacoma		
	2016 27.5%	2015 35.9%	-23%
2	Chevrolet Colorado		
	2016 24.2%	2015 25.6%	-6%
3	Honda Ridgeline		
	2016 20.3%	2015 10.5%	+93%
4	Nissan Frontier		
	2016 13.1%	2015 14.5%	-10%
5	GMC Canyon		
	2016 13.0%	2015 13.4%	-3%



3/4 & 1-TON PICKUP TRUCKS

1	Ford F-250 Super Duty		
	2016 22.3%	2015 23.9%	-7%
2	Chevrolet Silverado 2500HD		
	2016 18.0%	2015 19.0%	-6%
3	RAM 2500		
	2016 15.0%	2015 14.1%	+6%
4	GMC Sierra 2500HD		
	2016 9.1%	2015 7.4%	+24%
5	Ford F-350 Super Duty		
	2016 7.7%	2015 11.6%	-34%



FULL-SIZE PICKUP TRUCKS

1	Ford F-150		
	2016 25.2%	2015 26.1%	-3%
2	Chevrolet Silverado 1500		
	2016 19.8%	2015 21.7%	-9%
3	RAM 1500		
	2016 17.0%	2015 17.2%	-1%
4	Nissan Titan		
	2016 13.9%	2015 8.3%	+67%
5	GMC Sierra 1500		
	2016 11.8%	2015 13.3%	-11%



SMALL CARGO VANS

1	Mercedes-Benz Metris		
	2016 29.0%	2015 9.7%	+197%
2	Ford Transit Connect		
	2016 27.7%	2015 31.9%	-13%
3	RAM ProMaster City		
	2016 12.5%	2015 20.6%	-39%
4	Chevrolet City Express		
	2016 10.8%	2015 11.1%	-2%
5	Nissan NV200 Compact Cargo		
	2016 10.7%	2015 13.5%	-20%



MINIVANS

1	Honda Odyssey		
	2016 23.5%	2015 26.3%	-11%
2	Toyota Sienna		
	2016 17.6%	2015 23.8%	-26%
3	Chrysler Pacifica		
	2016 16.3%	2015 0.0%	New Entry
4	Dodge Grand Caravan		
	2016 10.0%	2015 11.1%	-10%
5	Chrysler Town & Country		
	2016 9.5%	2015 11.9%	-20%



LARGE CARGO & PASSENGER VANS

1	Mercedes-Benz Sprinter		
	2016 23.8%	2015 20.1%	+18%
2	Ford Transit		
	2016 22.5%	2015 17.7%	+27%
3	Chevrolet Express		
	2016 11.8%	2015 17.1%	-31%
4	Nissan NV Cargo		
	2016 11.2%	2015 9.0%	+25%
5	Nissan NV Passenger		
	2016 11.0%	2015 12.4%	-12%

EVERY MAP TELLS A STORY

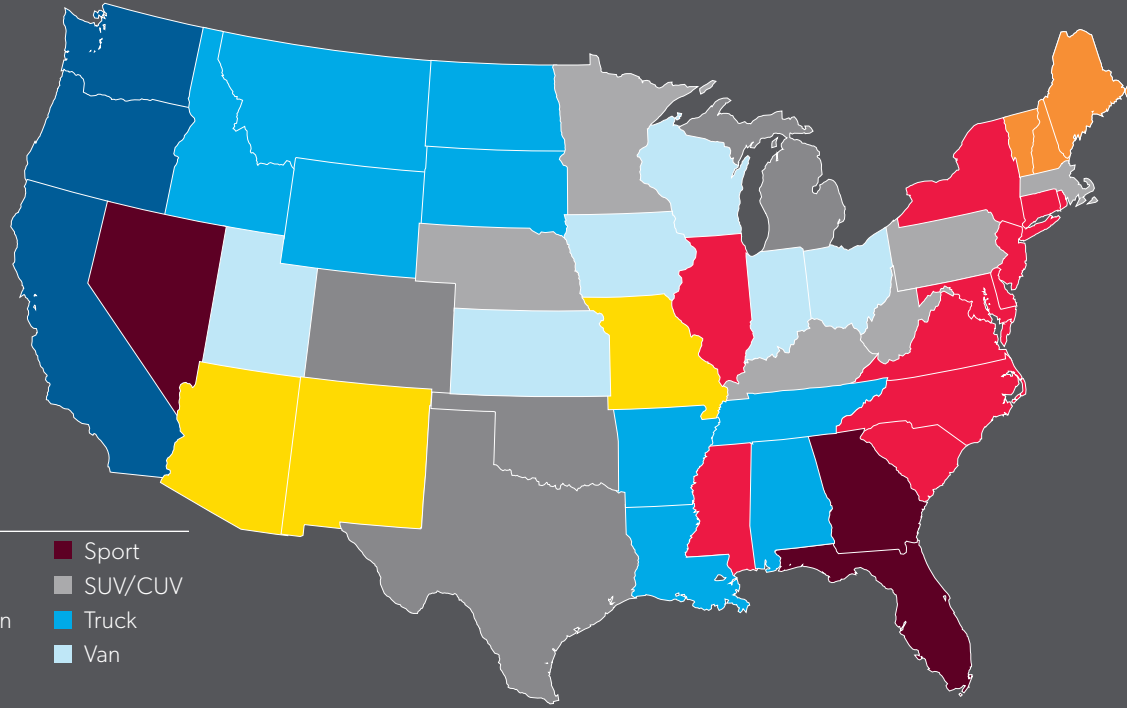
Data Reveals Shopper Interest In Body Styles, Brand Origins, Fuel Types, And Preferences In Luxury And Non-Luxury For Each State In 2016

Despite the recent decline in market interest, sedans rank as the #1 body style in more states than any other body style. Most of the popular hybrid cars are of Asian origin, and of the 21 states where gasoline is most favored, 71% of them are also the states where people

are gravitating to domestic brands. The country is pretty evenly split between interest in luxury and non-luxury (luxury ranks #1 in 26 states while non-luxury ranks #1 in 25 states), and the top 3 states for luxury are Connecticut, Texas, and New Jersey.

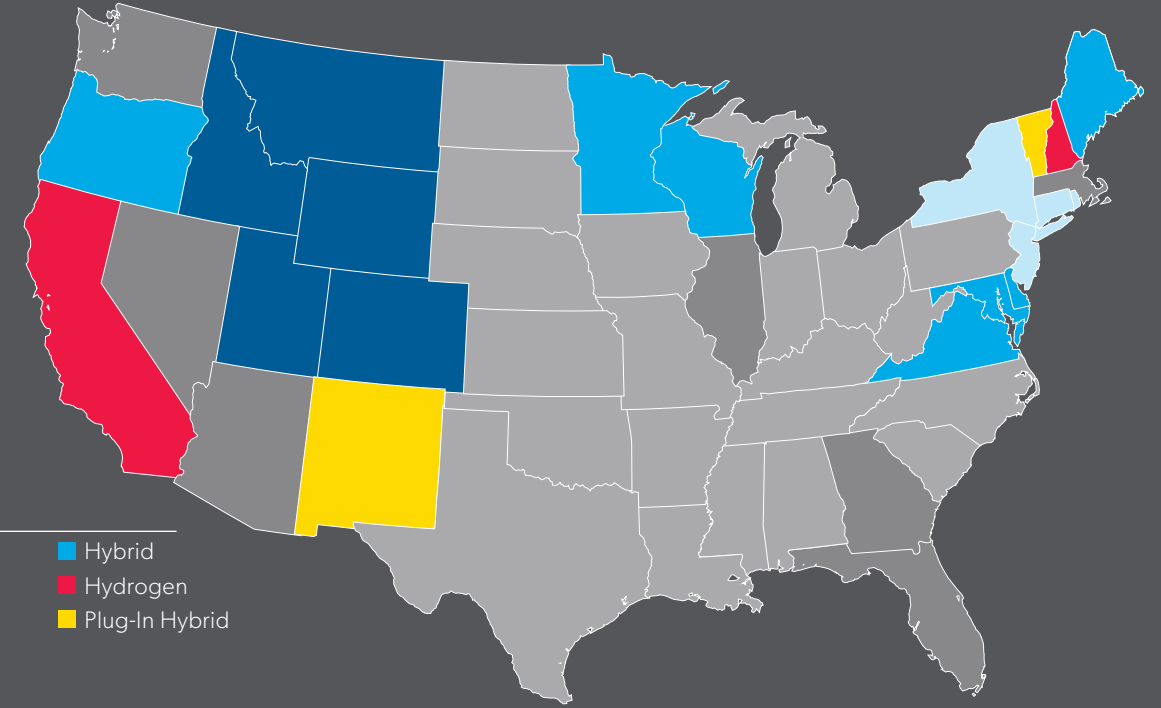
BODY STYLES

- Alternative Fuel
- Compact
- Hatchback/Wagon
- Performance
- Sedan
- Sport
- SUV/CUV
- Truck
- Van



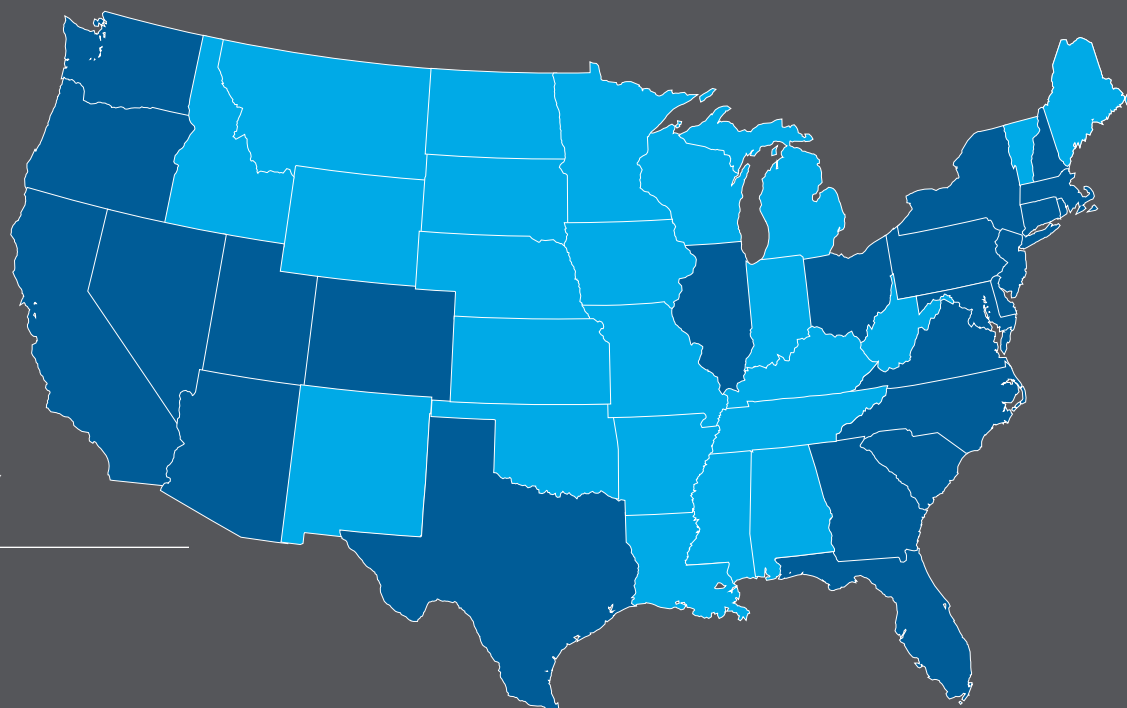
FUEL TYPES

- Diesel
- Electric
- Gasoline
- Hybrid
- Hydrogen
- Plug-In Hybrid



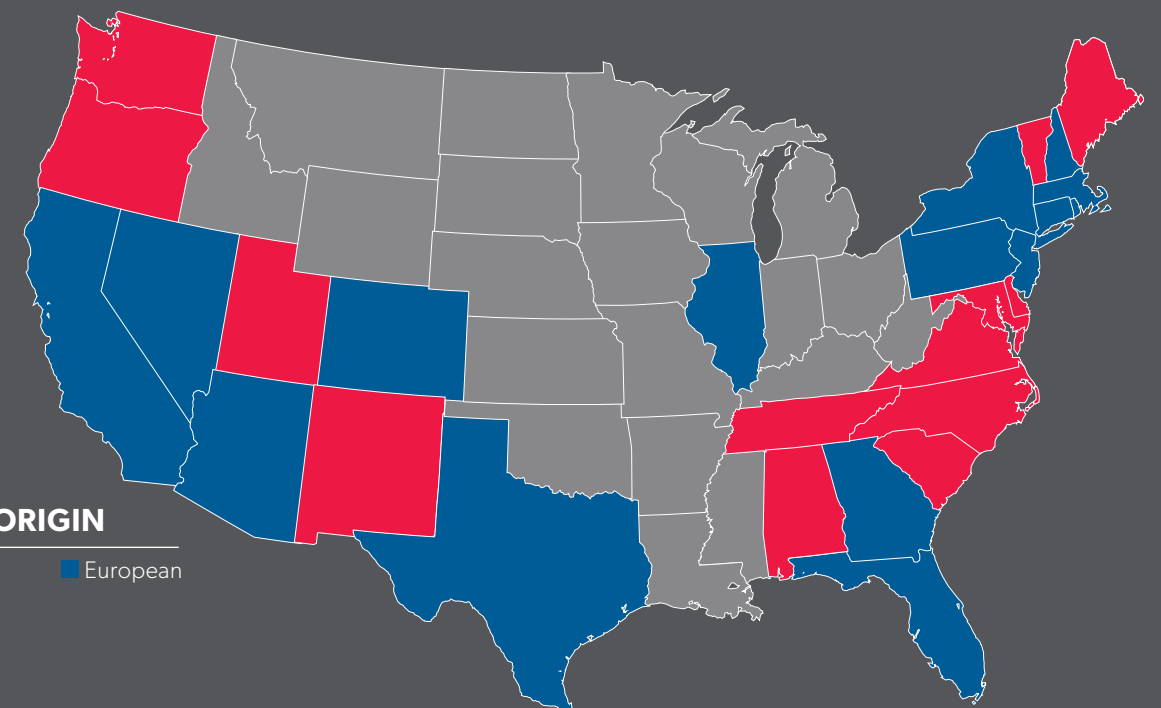
LUXURY/ NON-LUXURY PREFERENCE

- Luxury
- Non-Luxury



REGIONS OF ORIGIN

- Asian
- Domestic
- European



* Using a mathematical score that takes into account the mean and standard deviation of traffic to Jumpstart sites, these maps display shopper interest in body styles, brand origins, fuel types, and preferences in luxury and non-luxury vehicles across all states.

ABOVE ALL ELSE: A LOOK AT WHERE EACH BRAND LEADS IN CONSUMER INTEREST

The Scores Below Illustrate Shopper Affinity For Each Brand—The Higher The Score, The Stronger The Affinity

Acura

1	New Jersey	70
2	Connecticut	67
3	Maryland	66

Chevrolet

1	North Dakota	76
2	South Dakota	70
3	Iowa	68

GMC

1	North Dakota	77
2	South Dakota	73
3	Wyoming	70

Alfa Romeo

1	New York	69
2	New Jersey	69
3	California	69

Chrysler

1	South Dakota	78
2	Iowa	77
3	Michigan	76

Honda

1	Hawaii	80
2	Vermont	70
3	Ohio	68

Kia

1	Florida	67
2	Arizona	67
3	West Virginia	65

MINI

1	Utah	90
2	Vermont	67
3	Hawaii	63

smart

1	Utah	91
2	California	70
3	Oregon	67

Land Rover

1	Colorado	72
2	New York	70
3	New Jersey	67

Mitsubishi

1	West Virginia	86
2	Utah	80
3	Pennsylvania	69

Subaru

1	Vermont	79
2	Alaska	69
3	Maine	67

Audi

1	New Jersey	69
2	Connecticut	69
3	Massachusetts	67

Dodge

1	Wyoming	73
2	South Dakota	70
3	North Dakota	68

Hyundai

1	Florida	68
2	Maryland	65
3	Arizona	63

Lincoln

1	Michigan	87
2	Oklahoma	62
3	Illinois	61

Porsche

1	California	73
2	Hawaii	68
3	Connecticut	65

Toyota

1	Hawaii	79
2	Vermont	73
3	Maine	65

BMW

1	California	71
2	New York	68
3	New Jersey	67

FIAT

1	California	71
2	Oregon	66
3	Arizona	65

Infiniti

1	New Jersey	69
2	New York	67
3	Connecticut	62

Maserati

1	Utah	72
2	New York	71
3	New Jersey	70

RAM

1	Wyoming	83
2	Montana	75
3	Alaska	72

Volkswagen

1	Vermont	84
2	New Hampshire	69
3	Maine	68

Buick

1	South Dakota	75
2	Iowa	74
3	Michigan	73

Ford

1	North Dakota	70
2	South Dakota	69
3	Montana	68

Jaguar

1	New Jersey	69
2	Florida	68
3	New York	65

Mazda

1	Hawaii	71
2	Oregon	67
3	Washington	66

Scion¹

1	Hawaii	82
2	California	71
3	Nevada	68

Volvo

1	Vermont	78
2	New Hampshire	70
3	Connecticut	69

Cadillac

1	Michigan	88
2	Florida	64
3	Delaware	61

Genesis

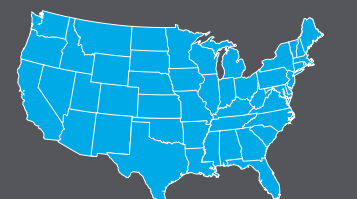
1	Florida	72
2	New Jersey	67
3	Maryland	66

Jeep

1	West Virginia	84
2	Wyoming	70
3	Michigan	67

Mercedes-Benz

1	California	70
2	New York	69
3	New Jersey	68



* Using a mathematical score that takes into account the mean and standard deviation of traffic to our sites, these rankings not only show the top states for each brand but a score to indicate where that brand falls on the spectrum of consumer interest.

1. Shopping data will be reported under Toyota in 2017

With 1.9 million in new vehicle sales and a growth of nearly 3% from 2015, 2016 marked the fourth consecutive record-breaking year for light vehicle sales in Canada.

The new vehicle market was dominated by the light truck category (SUVs, CUVs, vans, and trucks) holding 66% share of market and selling nearly double the amount of the car category. While the light car category decreased 10%, the light truck category gained 6% share. Luxury sales continue to strengthen and now represent 12% share of the Canadian car market, an increase of 5% from 2015.

* Shopper interest data from Jumpstart Internal Analytics, January 2015 – December 2016.
Sales data from Wards Auto, December 2016.




CANADA Audience And Data

Jumpstart is:

Car and Driver, Canadian Black Book, U.S. News Best Cars, J.D. Power Cars, NADAguides, Autoweek.com, Autobytel, Autolist.com, Daily News Autos, LeftLaneNews.com, CarSoup, and CarBuzz.

THE JUMPSTART AUDIENCE 2 MILLION STRONG

2015 – 2016 Jumpstart Visitors

	% Change	2016	2015
 Desktop	-3%	49%	51%
 Smartphone	+6%	37%	35%
 Tablet	-5%	14%	15%

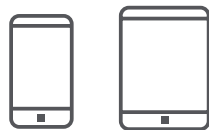
Smartphones And Tablets 2016

61% iPhone
36% Android Phone

84% iPad
16% Android Tablet






Visits from desktop dropped below 50% for the first time in 2016



Android grew 12% for smartphone and tablet

MOVING IN ON THE COMPETITION


	 TOTAL MULTI-PLATFORM UNIQUE VISITORS (M)	 TOTAL PAGES VIEWED (M)	 TOTAL MINUTES (M)
Kijiji.CA	4,725	204	194
AutoGuide Group	2,127	16	16
Jumpstart	1,930	22	13
Autotrader.CA	1,835	52	47
Internet Brands Automotive	1,398	9	11
MSN Autos - Canada	1,014	26	33
Driving.CA	648	2	2
Edmunds.com	545	4	3
Autoblog	497	3	2
TEN Automotive (In-Market)	331	2	4
Cars.com	247	1	1
KBB.com	98	1	0

* Google Analytics Premium, Q4 2015 And Q4 2016

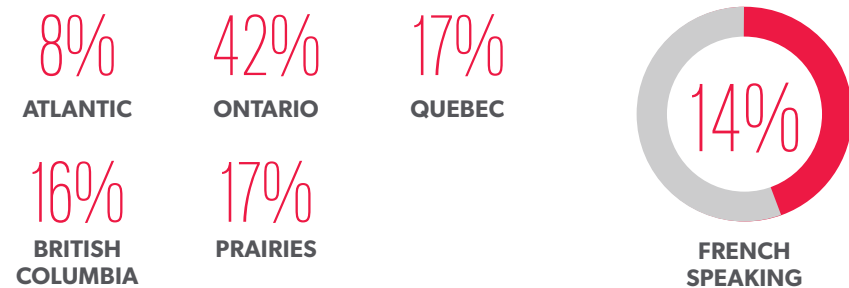
* comScore Media Metrix Multi-Platform, Q4 2016

ABOUT OUR SHOPPERS

59% 25-54 YEARS 38% 18-34 YEARS

C\$72.3K  MEDIAN HOUSEHOLD INCOME

Region And Language



Audience: Men And Women



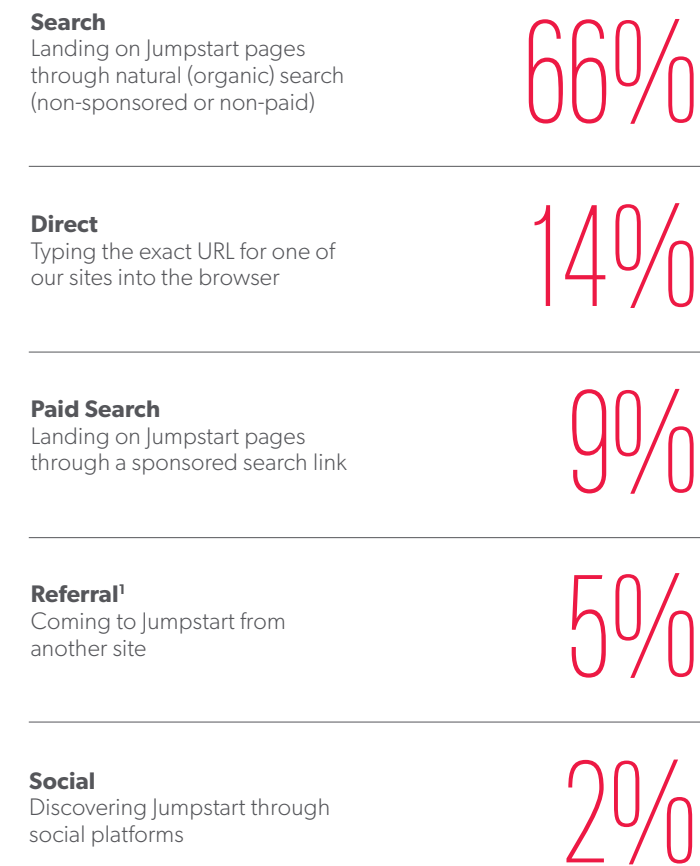
* comScore Media Metrix Multi-Platform, December 2016

HOW SHOPPERS ARE REACHING OUR PORTFOLIO

New And Returning Visitors



Traffic Sources



* Google Analytics Premium, Q4 2016

1. 2015 referral traffic was overstated due to misclassifications in Google Analytics and was corrected in 2016

THE 2016 JUMPSTART AUTO SHOPPING PATHS



AUDIENCE

These common paths show how visitors navigate through the auto shopping process and how they work through the many layers of information that is available to them. Ultimately, most paths will involve researching a specific vehicle by visiting a vehicle detail or listings page within the first three interactions.



HOMEPAGE

32%



Nearly one-third of shoppers who start out on a homepage go to a research landing page, which serves as a filter for narrowing their vehicle search before checking out listings



RESEARCH LANDING PAGE

15%



LISTINGS



SHOPPING



REVIEWS

38%



Among visitors who enter our sites on vehicle reviews, 38% move on to vehicle detail pages, and one-fifth of them go back to reviews to do more research



VEHICLE DETAIL PAGES

20%



REVIEWS



RANKINGS

59%



Vehicle rankings pages are a quick way to learn about the top vehicles in a segment, and nearly 60% of those who start there move on to a vehicle detail page in their second interaction



VEHICLE DETAIL PAGES

23%



RANKINGS



VEHICLE DETAIL PAGES

27%



Many shoppers start their research directly on vehicle detail pages (often coming from search), and of those, 27% of shoppers go on to view photo galleries, and 19% return to a vehicle detail page to do further research

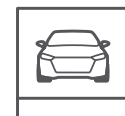


PHOTO GALLERY

19%



VEHICLE DETAIL PAGES



RESEARCH LANDING PAGE

47%



Nearly half of shoppers who start on a research landing page (often filtering new/used/CPO, body style, price point, etc.) continue on to a vehicle detail page in their second interaction



VEHICLE DETAIL PAGES

26%



RESEARCH LANDING PAGE

* Internal Analytics, Q4 2016
Sample size equals 669 thousand visitors

Top 10 BRANDS Share Of Canada Light Vehicle Sales

	BRAND	% Change	2016 Sales (K)
1	FORD		
	2016 15.0%	+6%	289.00
	2015 14.1%		
2	TOYOTA		
	2016 9.9%	+2%	191.03
	2015 9.7%		
3	HONDA		
	2016 8.6%	+3%	166.45
	2015 8.4%		
4	CHEVROLET		
	2016 7.9%	-1%	151.46
	2015 8.0%		
5	HYUNDAI		
	2016 7.2%	-1%	138.07
	2015 7.3%		
6	NISSAN		
	2016 5.8%	+2%	112.16
	2015 5.7%		
7	RAM		
	2016 4.8%	-4%	93.02
	2015 5.0%		
8	GMC		
	2016 4.4%	-4%	84.67
	2015 4.6%		
9	JEEP		
	2016 4.3%	+2%	83.09
	2015 4.2%		
10	DODGE		
	2016 4.3%	-7%	83.04
	2015 4.6%		

Top 10 BRANDS Highest Growth In Canada Light Vehicle Sales

	BRAND	% Growth	2016 Sales (K)
1	SMART	+154%	1.88
2	JAGUAR	+127%	3.03
3	TESLA	+30%	2.70
4	VOLVO	+24%	6.10
5	LAND ROVER	+15%	9.14
6	BUICK	+11%	19.05
7	AUDI	+11%	30.54
8	PORSCHE	+7%	7.06
9	FORD	+6%	289.00
10	BMW	+5%	38.01

* Sales data from Wards Auto, January 2015 – December 2016

Top 10 BRANDS Share Of Shopper Interest

	BRAND	% Change	2016 Sales (K)
1	FORD		
	2016 9.1%	-3%	289.00
	2015 9.3%		
2	CHEVROLET		
	2016 8.0%	+5%	151.46
	2015 7.7%		
3	HONDA		
	2016 7.6%	+11%	166.45
	2015 6.8%		
4	TOYOTA		
	2016 6.4%	-5%	191.03
	2015 6.8%		
5	NISSAN		
	2016 5.7%	-6%	112.16
	2015 6.1%		
6	MAZDA		
	2016 5.3%	+4%	69.21
	2015 5.1%		
7	BMW		
	2016 4.5%	-1%	38.01
	2015 4.5%		
8	AUDI		
	2016 3.9%	-7%	30.54
	2015 4.2%		
9	JEEP		
	2016 3.9%	+17%	83.09
	2015 3.3%		
10	MERCEDES-BENZ		
	2016 3.8%	-14%	46.45
	2015 4.4%		

Top 10 BRANDS Highest Growth In Shopper Interest

	BRAND	% Growth	2016 Sales (K)
1	TESLA	+96%	2.70
2	JAGUAR	+35%	3.03
3	INFINITI	+32%	12.09
4	CHRYSLER	+25%	16.05
5	LINCOLN	+23%	8.32
6	VOLVO	+20%	6.10
7	JEEP	+17%	83.09
8	FIAT	+15%	2.36
9	KIA	+13%	69.71
10	HONDA	+11%	166.45













* Jumpstart Internal Analytics, January 2015 – December 2016
Sales data from Wards Auto, January – December 2016

Top 10 VEHICLES Share Of Shopper Interest

	2016 Ranking	Share	Sales (K)
1	Honda Civic	1.8%	64.6
2	Ford F-150	1.3%	141.8
3	Mazda CX-5	1.2%	25.1
4	Ford Mustang	1.1%	7.7
5	Honda CR-V	1.1%	44.8
6	Mazda Mazda3	1.0%	27.7
7	Jeep Wrangler	0.9%	18.5
8	Ford Escape	0.9%	46.7
9	Chevrolet Corvette	0.9%	1.8
10	RAM 1500	0.9%	88.6

	2015 Ranking	Share	Sales (K)
1	Ford Mustang	1.4%	6.9
2	Ford F-150	1.3%	115.1
3	Honda Civic	1.1%	65.0
4	RAM 1500	1.1%	88.8
5	Chevrolet Camaro	0.9%	2.7
6	Toyota Tacoma	0.9%	11.8
7	Mazda CX-5	0.8%	22.3
8	Jeep Grand Cherokee	0.8%	11.6
9	Mazda Mazda3	0.8%	34.8
10	Honda CR-V	0.8%	39.0

BODY STYLES Share Of Interest

Body Style	2016	% Change 2015 – 2016
Luxury 	33.7%	-4%
Non-Luxury 	66.3%	+2%
SUV/CUV 	30.0%	+6%
Sedan 	23.9%	+3%
Sport 	15.7%	-9%
Truck 	9.4%	-2%
Coupe 	4.2%	+1%
Hatchback/Wagon 	4.0%	+9%
Performance 	3.9%	-17%
Van 	3.4%	0%
Compact 	3.1%	-11%
Alternative Fuel 	2.2%	+9%

* Jumpstart Internal Analytics, January 2015 – December 2016
Sales data from Wards Auto, January 2015 – December 2016

* Jumpstart Internal Analytics, January 2015 – December 2016

SHARE OF SHOPPER INTEREST AND SALES

Automotive Brands

BRAND	SHARE OF SHOPPER INTEREST		SHARE OF LIGHT VEHICLE SALES		2016 SALES (K)
	2016	% CHANGE 2015 – 2016	2016	% CHANGE 2015 – 2016	
Ford	9.1%	-3%	15.0%	+6%	289.00
Chevrolet	8.0%	+5%	7.9%	-1%	151.46
Honda	7.6%	+11%	8.6%	+3%	166.45
Toyota	6.4%	-5%	9.9%	+2%	191.03
Nissan	5.7%	-6%	5.8%	+2%	112.16
Mazda	5.3%	+4%	3.6%	-6%	69.21
BMW	4.5%	-1%	2.0%	+5%	38.01
Audi	3.9%	-7%	1.6%	+11%	30.54
Jeep	3.9%	+17%	4.3%	+2%	83.09
Mercedes-Benz	3.8%	-14%	2.4%	+3%	46.45
Subaru	3.5%	-11%	2.6%	+5%	50.19
Dodge	3.2%	-10%	4.3%	-7%	83.04
Hyundai	3.2%	+10%	7.2%	-1%	138.07
Volkswagen	3.1%	-20%	3.1%	-17%	60.02
Kia	2.7%	+13%	3.6%	+5%	69.71
GMC	2.6%	-9%	4.4%	-4%	84.67
Porsche	2.4%	-4%	0.4%	+7%	7.06
Acura	2.3%	+1%	1.1%	-7%	20.23

BRAND	SHARE OF SHOPPER INTEREST		SHARE OF LIGHT VEHICLE SALES		2016 SALES (K)
	2016	% CHANGE 2015 – 2016	2016	% CHANGE 2015 – 2016	
Lexus	1.9%	0%	1.2%	-1%	22.51
Cadillac	1.9%	+5%	0.6%	-4%	12.16
Infiniti	1.9%	+32%	0.6%	+4%	12.09
Land Rover	1.7%	-6%	0.5%	+15%	9.14
RAM	1.6%	-14%	4.8%	-4%	93.02
Volvo	1.3%	+20%	0.3%	+24%	6.10
Buick	1.3%	+9%	1.0%	+11%	19.05
Chrysler	1.3%	+25%	0.8%	-37%	16.05
Lincoln	1.2%	+23%	0.4%	+2%	8.32
Jaguar	1.2%	+35%	0.2%	+127%	3.03
Mitsubishi	0.9%	-8%	0.8%	0%	16.10
FIAT	0.8%	+15%	0.1%	-58%	2.36
Scion ¹	0.6%	-27%	0.2%	-11%	4.25
Tesla	0.5%	+96%	0.1%	+30%	2.70
MINI	0.3%	-33%	0.3%	-9%	6.61
Genesis	0.2%	New Entry	0.0%	New Entry	0.09
Alfa Romeo	0.2%	-39%	0.0%	-15%	0.09
smart	0.2%	+3%	0.1%	+154%	1.88

* Jumpstart Internal Analytics, January 2015 – December 2016
Sales data from Wards Auto, January 2015 – December 2016

1. Sales and shopper interest data will be reported under Toyota in 2017



TOP

By The Numbers CARS

Car sales declined 10% in 2016, falling below 700 thousand units and dropping to 34% share of market. Consumer demand for larger vehicles such as trucks, CUVs and SUVs is the main driver

of this trend but low gas prices have certainly contributed as well. Ford's F-Series alone outsold its entire car lineup by more than three times.

Non-Luxury Cars

Among non-luxury car segments, compact cars saw some success in 2016 with 10% growth in Jumpstart shopper interest. Honda Civic, Hyundai Elantra, and Nissan Sentra were the key drivers of this growth, each experiencing a minimum increase of 40% in the segment compared to 2015, and sales increases of up to 10%. Elantra, which ranked 8th in 2015, moved up five spots to rank 3rd in 2016. Amid Volkswagen's struggles in North America, Jetta fell out of the top 5 in 2016, landing at 7th with a 34% decrease in shopper interest, and a 19% decrease in sales.

The midsize sedan segment actually saw 3% growth in shopper interest, despite a 13% decrease in sales. Chevrolet Malibu is the largest contributor to segment growth. The newly redesigned model gained a 70% increase in shopper interest, and a 40% increase in sales compared to 2015. Despite some other notable gains among competitors in shopper interest (Kia Optima +30%, Ford Fusion +23%), no other midsize sedans saw the sales growth that Malibu had in the Canadian market.

Luxury Cars

Among the luxury cars, all segments were down in sales with the exception of premium luxury sports cars. When looking at shopper interest, the most significant growth was seen among full-size luxury sedans at 32%. This was largely driven by Cadillac CT6, which grew by 50% and ranked 4th in 2016; CT6 accounted for nearly 13% share of the segment. For 2017, we expect Cadillac to continue to grab share but we'll also be watching BMW 7-Series and Audi A7, both of which had significant gains in sales in 2016 and rank in the top 5 in the segment.

* Shopper interest data from Jumpstart Internal Analytics, January 2015 – December 2016.
Sales data from Wards Auto, January 2015 – December 2016.



SUBCOMPACT CARS

			% Change
1	Honda Fit		
	2016 12.8%	2015 14.1%	-9%
2	Ford Fiesta		
	2016 11.2%	2015 12.4%	-10%
3	Hyundai Accent		
	2016 10.2%	2015 7.2%	+42%
4	FIAT 500		
	2016 7.6%	2015 7.9%	-4%
5	Toyota Yaris		
	2016 7.1%	2015 5.3%	+33%



MIDSIZE SEDANS

			% Change
1	Honda Accord		
	2016 17.3%	2015 18.0%	-4%
2	Toyota Camry		
	2016 11.2%	2015 10.3%	+9%
3	Ford Fusion		
	2016 10.5%	2015 8.4%	+24%
4	Chevrolet Malibu		
	2016 10.3%	2015 6.0%	+71%
5	Mazda Mazda6		
	2016 8.2%	2015 8.1%	+1%



COMPACT CARS

			% Change
1	Honda Civic		
	2016 22.0%	2015 15.4%	+43%
2	Mazda Mazda3		
	2016 11.9%	2015 11.3%	+5%
3	Hyundai Elantra		
	2016 7.4%	2015 5.3%	+41%
4	Chevrolet Cruze		
	2016 7.4%	2015 6.9%	+6%
5	Toyota Corolla		
	2016 6.9%	2015 6.8%	+2%



FULL-SIZE SEDANS

			% Change
1	Dodge Charger		
	2016 22.7%	2015 24.5%	-8%
2	Chrysler 300		
	2016 17.5%	2015 18.8%	-7%
3	Chevrolet Impala		
	2016 14.2%	2015 13.0%	+10%
4	Ford Taurus		
	2016 10.8%	2015 11.3%	-5%
5	Nissan Maxima		
	2016 10.4%	2015 14.1%	-26%



LUXURY SPORTS CARS

			% Change
1	Chevrolet Corvette		
	2016 31.9%	2015 22.3%	+43%
2	Porsche 718 Boxster		
	2016 10.6%	2015 6.9%	+53%
3	BMW M4		
	2016 9.6%	2015 9.1%	+5%
4	Porsche 718 Cayman		
	2016 7.9%	2015 9.0%	-12%
5	Jaguar F-Type		
	2016 7.5%	2015 7.7%	-2%



MIDSIZE LUXURY SEDANS

			% Change
1	Mercedes-Benz C-Class		
	2016 19.3%	2015 27.9%	-31%
2	Mercedes-Benz E-Class		
	2016 10.5%	2015 7.4%	+42%
3	BMW 5-Series		
	2016 9.6%	2015 7.2%	+35%
4	Cadillac CTS		
	2016 8.2%	2015 12.3%	-33%
5	Hyundai Genesis		
	2016 7.8%	2015 8.9%	-12%



ENTRY LUXURY SEDANS

			% Change
1	BMW 3-Series		
	2016 16.2%	2015 15.7%	+3%
2	Audi A4		
	2016 11.0%	2015 10.7%	+3%
3	Audi A3		
	2016 8.2%	2015 9.4%	-13%
4	Infiniti Q50		
	2016 7.5%	2015 5.8%	+31%
5	Volvo S60		
	2016 6.5%	2015 6.6%	-2%



FULL-SIZE LUXURY SEDANS

			% Change
1	Tesla Model S		
	2016 14.3%	2015 12.4%	+15%
2	BMW 7-Series		
	2016 12.3%	2015 12.6%	-3%
3	Porsche Panamera		
	2016 12.1%	2015 10.2%	+18%
4	Cadillac CT6		
	2016 11.8%	2015 7.5%	+58%
5	Mercedes-Benz S-Class		
	2016 11.0%	2015 12.5%	-12%



TOP

By The Numbers SUVs/CUVs

SUV/CUV sales dominated again in 2016 and accounted for 40% of all light vehicles sold in Canada. And despite being 3 of the smaller sub-segments, most of the increases were driven by large SUVs, full-size luxury SUVs/CUVs, and subcompact SUVs/CUVs (+45%, +25%, and

+22% in sales share, respectively). But we saw a slight diversion of the popular segments when it came to shopper interest. Consumers gravitated more to the compact SUV/CUV segment—the top segment among our audience in Canada—and to the midsize luxury SUV/CUV segment.

Non-Luxury SUVs/CUVs

Despite only capturing 1% share of vehicle sales, large SUVs saw a 45% uptick in sales share in 2016. Modest gains among 4 of the top 5 vehicles in this segment of just 7 competitors is helping it increase its share. The key driver of growth in the non-luxury SUV/CUV segments remains within the compact category.

On the sales front, the most significant growth was with Kia Sportage (+61%) and Hyundai Tucson (+34%), but shopper interest painted a different story. The highest growth was among Jeep Patriot and Compass (+56% and +49%, respectively), but very notable growth was also seen among competitors, Chevrolet Equinox (+25%), Kia Sportage (+19%), and Ford Escape (+18%). We'll also be keeping a close eye on Mazda CX-5, which leads in shopper interest and gained 12% in share in 2016, but ranks 6th in sales.

Luxury SUVs/CUVs

The full-size luxury SUV/CUV segment had some interesting gains in 2016. The greatest growth in sales share was for the highly recognized Volvo XC90 (+140%), a vehicle we've kept our eye on closely in both the U.S. and Canadian market. Audi Q7, which now ranks 3rd, saw outstanding growth in sales share at 103%, bringing it 10.5% share of the segment, up from about 5% in 2015. We are continuing to watch Mercedes-Benz as well; with its expanding lineup, consumer interest shot up almost 200% for the GLS and the GLC gained more than 200% in the midsize luxury SUV/CUV segment.

* Shopper interest data from Jumpstart Internal Analytics, January 2015 – December 2016.
Sales data from Wards Auto, January 2015 – December 2016.



SUBCOMPACT SUVs/CUVs

Rank	Model	2016	2015	% Change
1	Mazda CX-3	23.1%	20.4%	+14%
2	Honda HR-V	17.1%	21.8%	-22%
3	Jeep Renegade	15.0%	12.9%	+16%
4	Chevrolet Trax	11.5%	10.0%	+15%
5	Nissan Juke	11.2%	16.4%	-31%



COMPACT SUVs/CUVs

Rank	Model	2016	2015	% Change
1	Mazda CX-5	10.7%	9.5%	+13%
2	Honda CR-V	9.9%	9.0%	+10%
3	Jeep Wrangler	8.5%	8.4%	+1%
4	Ford Escape	8.4%	7.0%	+19%
5	Toyota RAV4	6.7%	7.9%	-15%



COMPACT LUXURY SUVs/CUVs

Rank	Model	2016	2015	% Change
1	BMW X1	21.5%	22.0%	-2%
2	Acura RDX	14.6%	15.7%	-7%
3	Lexus NX	12.5%	10.5%	+20%
4	Mercedes-Benz GLA-Class	10.8%	11.6%	-7%
5	Audi Q3	10.2%	11.6%	-12%



MIDSIZE LUXURY SUVs/CUVs

Rank	Model	2016	2015	% Change
1	Audi Q5	12.4%	15.8%	-21%
2	BMW X3	9.8%	11.9%	-18%
3	Lexus RX	9.5%	12.7%	-25%
4	Mercedes-Benz GLC-Class	8.0%	3.0%	+170%
5	Porsche Macan S	7.9%	9.0%	-13%



MIDSIZE SUVs/CUVs

Rank	Model	2016	2015	% Change
1	Jeep Grand Cherokee	8.0%	7.9%	+2%
2	Honda Pilot	7.1%	7.4%	-3%
3	Toyota Highlander	7.1%	5.4%	+31%
4	Dodge Durango	6.6%	7.5%	-13%
5	Ford Explorer	6.1%	5.8%	+6%



FULL-SIZE SUVs

Rank	Model	2016	2015	% Change
1	Ford Expedition	18.8%	19.3%	-3%
2	Nissan Armada	16.3%	10.4%	+57%
3	Chevrolet Tahoe	15.6%	16.3%	-5%
4	Chevrolet Suburban	15.5%	15.5%	0%
5	Toyota Sequoia	11.6%	10.5%	+10%



FULL-SIZE LUXURY SUVs/CUVs

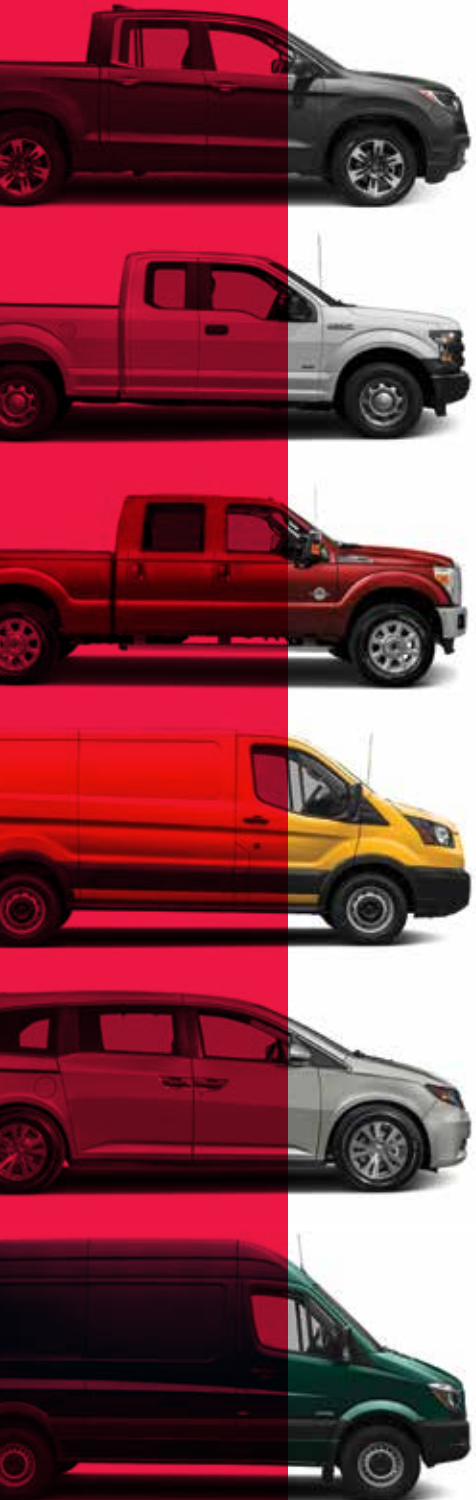
Rank	Model	2016	2015	% Change
1	Acura MDX	14.4%	15.2%	-5%
2	Audi Q7	11.6%	14.6%	-20%
3	Volvo XC90	10.5%	8.3%	+26%
4	BMW X5	10.3%	10.2%	+1%
5	Land Rover Range Rover Sport	7.0%	6.6%	+6%



LARGE LUXURY SUVs

Rank	Model	2016	2015	% Change
1	Land Rover Range Rover	16.2%	13.4%	+21%
2	Mercedes-Benz GL-Class	13.3%	25.1%	-47%
3	Infiniti QX80	11.1%	10.2%	+9%
4	Cadillac Escalade	9.7%	8.6%	+13%
5	Lincoln Navigator	9.1%	6.1%	+49%

TOP



By The Numbers

TRUCKS AND VANS

Trucks

Trucks accounted for nearly 20% of light vehicle sales in Canada, up from 18% in 2015. And while both small and large pickup sales increased, the overall growth in trucks was largely driven by small/midsize pickups (+23%). The top 3 selling trucks remained the same as 2015, Ford F-150, RAM 1500, and GMC Sierra 1500, but there were shifts in sales share among them. Most notably, Ford's F-Series grabbed another 15% in share of full-size trucks in 2016 bringing it up to nearly 42%, which is a significant gain considering it previously held 36% share of the segment.

In the small/midsize truck category, the majority of growth can be directly attributed to the new Honda Ridgeline. After its introduction in early 2016, Ridgeline's share of segment sales increased more than 800% (less than 1% share in 2015 and 8.2% share in 2016), and shopper interest jumped 74%. With this much growth in a small segment, Ridgeline was able to capture shopper attention away from all 4 competitors that rank above it (Toyota Tacoma, Chevrolet Colorado, GMC Canyon, and Nissan Frontier).

Vans

Although vans only account for 7% of sales (up 6% from 2015), the category overall gained 1 percentage point in both share of sales and shopper interest in 2016. Most of this growth was among large cargo/passenger vans and minivans.

From a sales perspective, Kia Sedona saw the most growth in the minivan segment, increasing share by 79% and bringing it from 3% share in 2015 to 5.4% share in 2016. New entry to the segment, Chrysler Pacifica, also made significant gains in its 1st year on the market. Grabbing nearly 3% share of the segment in sales, and an astounding 16% share of shopper interest. With this traction in consumer interest, we'll be watching Pacifica closely and monitoring its position among its top 5 competitors. Despite being the segment leader in shopper interest, Honda Odyssey can't compete with Dodge Grand Caravan, which dominates by a wide margin in sales volume.

In the large cargo/passenger van segment, GMC Savana cargo and passenger are showing strong gains in shopper interest (cargo +287%) and sales (passenger +112%).

* Shopper interest data from Jumpstart Internal Analytics, January 2015 – December 2016.
Sales data from Wards Auto, January 2015 – December 2016.



MIDSIZE PICKUP TRUCKS

			% Change
1	Honda Ridgeline		
	2016 27.6%	2015 16.1%	+72%
2	Toyota Tacoma		
	2016 23.9%	2015 30.8%	-22%
3	Chevrolet Colorado		
	2016 20.7%	2015 24.3%	-15%
4	GMC Canyon		
	2016 14.8%	2015 16.2%	-9%
5	Nissan Frontier		
	2016 11.3%	2015 12.5%	-9%



3/4 & 1-TON PICKUP TRUCKS

1	Ford F-250 Super Duty		% Change
	2016 21.4%	2015 21.5%	0%
2	RAM 2500		
	2016 15.9%	2015 16.7%	-5%
3	Chevrolet Silverado 2500HD		
	2016 13.9%	2015 11.6%	+20%
4	GMC Sierra 2500HD		
	2016 13.2%	2015 12.6%	+4%
5	RAM 3500		
	2016 9.7%	2015 10.7%	-9%



FULL-SIZE PICKUP TRUCKS

1	Ford F-150		% Change
	2016 31.4%	2015 26.9%	+17%
2	RAM 1500		
	2016 20.9%	2015 23.6%	-11%
3	Chevrolet Silverado 1500		
	2016 15.5%	2015 17.0%	-9%
4	GMC Sierra 1500		
	2016 11.9%	2015 12.3%	-3%
5	Nissan Titan		
	2016 11.8%	2015 8.6%	+37%



SMALL CARGO VANS

1	Ford Transit Connect		% Change
	2016 32.0%	2015 34.3%	-7%
2	Mercedes-Benz Metris		
	2016 29.8%	2015 16.3%	+83%
3	RAM ProMaster City		
	2016 12.2%	2015 13.6%	-10%
4	Nissan NV200 Compact Cargo		
	2016 11.0%	2015 13.7%	-20%
5	Chevrolet City Express		
	2016 8.9%	2015 10.3%	-13%



LARGE CARGO & PASSENGER VANS

1	Mercedes-Benz Sprinter		% Change
	2016 24.8%	2015 24.3%	+2%
2	Ford Transit		
	2016 22.9%	2015 22.1%	+4%
3	RAM ProMaster		
	2016 10.4%	2015 12.8%	-19%
4	Nissan NV Cargo		
	2016 9.7%	2015 7.0%	+39%
5	Nissan NV Passenger		
	2016 9.6%	2015 12.9%	-26%

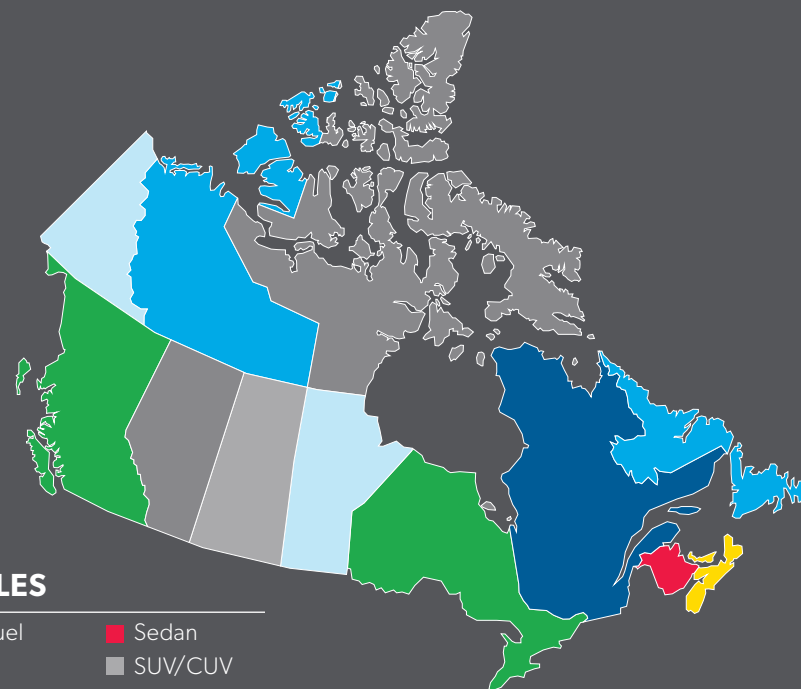


MINIVANS

1	Honda Odyssey		% Change
	2016 20.5%	2015 22.4%	-9%
2	Dodge Grand Caravan		
	2016 17.5%	2015 16.7%	+5%
3	Chrysler Pacifica		
	2016 16.0%	2015 0.0%	New Entry
4	Toyota Sienna		
	2016 15.4%	2015 20.9%	-26%
5	Mazda Mazda5		
	2016 9.0%	2015 13.0%	-31%

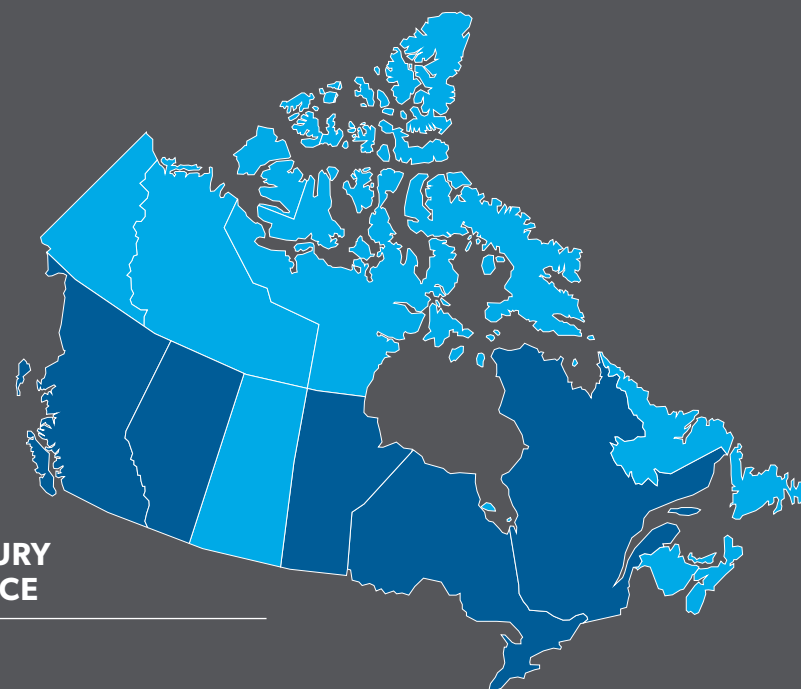
EVERY MAP TELLS A STORY

Data Reveals Shopper Interest In Body Styles, Brand Origins, Fuel Types, And Preferences In Luxury And Non-Luxury For Each Province and Territory In 2016



BODY STYLES

- Alternative Fuel
- Compact
- Coupe
- Performance
- Sedan
- SUV/CUV
- Truck
- Van

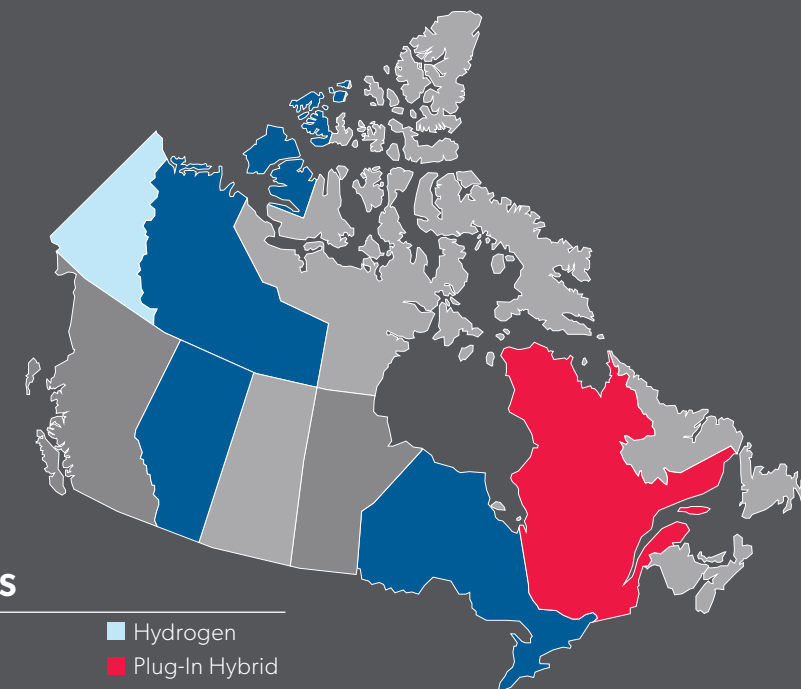


LUXURY/ NON-LUXURY PREFERENCE

- Luxury
- Non-Luxury

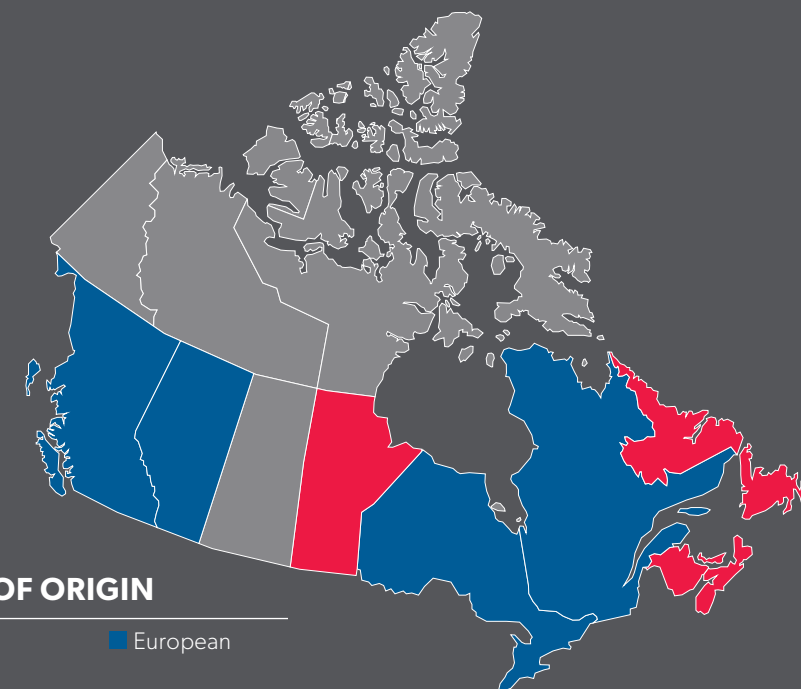
Diesel is a popular fuel option among Canadians as it ranks #1 in more provinces and territories than any other alternative fuel source. And Canadian luxury shoppers are particularly fuel conscious; in all of the provinces and territories where luxury ranks #1, alternative fuel is the top fuel source.

Non-luxury is most popular in 62% of the provinces and territories and alternative fuel interest is strongest in Quebec where shoppers gravitate more toward plug-in hybrids. Manitoba is the only luxury-centric region where Asian brands are more popular than European brands.



FUEL TYPES

- Diesel
- Electric
- Gasoline
- Hydrogen
- Plug-In Hybrid



REGIONS OF ORIGIN

- Asian
- Domestic
- European

* Using a mathematical score that takes into account the mean and standard deviation of traffic to Jumpstart sites, these maps display shopper interest in body styles, brand origins, fuel types, and preferences in luxury and non-luxury vehicles across all provinces and territories.

ABOVE ALL ELSE: A LOOK AT WHERE EACH BRAND LEADS IN CONSUMER INTEREST

The Scores Below Illustrate Shopper Affinity For Each Brand—
The Higher The Score, The Stronger The Affinity

Acura

1	Alberta	63
2	British Columbia	61
3	Ontario	61

Chevrolet

1	Northwest Territories	64
2	Newfoundland and Labrador	60
3	Saskatchewan	60

GMC

1	Nunavut	67
2	Yukon Territory	66
3	Northwest Territories	63

Alfa Romeo

1	Ontario	68
2	Quebec	67
3	British Columbia	64

Chrysler

1	Manitoba	66
2	Saskatchewan	64
3	Ontario	60

Honda

1	Prince Edward Island	67
2	Newfoundland and Labrador	63
3	Nova Scotia	61

Audi

1	Quebec	67
2	Ontario	65
3	British Columbia	63

Dodge

1	Saskatchewan	69
2	Yukon Territory	62
3	Northwest Territories	61

Hyundai

1	Prince Edward Island	64
2	Nova Scotia	63
3	New Brunswick	60

BMW

1	British Columbia	69
2	Ontario	65
3	Quebec	64

FIAT

1	British Columbia	66
2	Quebec	66
3	Ontario	62

Infiniti

1	Alberta	63
2	Ontario	63
3	British Columbia	61

Buick

1	Prince Edward Island	65
2	Saskatchewan	63
3	New Brunswick	63

Ford

1	Northwest Territories	78
2	Yukon Territory	60
3	Saskatchewan	55

Jaguar

1	Ontario	64
2	British Columbia	62
3	Quebec	61

Cadillac

1	Nunavut	64
2	Saskatchewan	63
3	Alberta	61

Genesis

1	Nunavut	75
2	Ontario	62
3	Quebec	58

Jeep

1	Nunavut	77
2	Northwest Territories	64
3	Yukon Territory	53

Kia

1	Newfoundland and Labrador	64
2	Prince Edward Island	61
3	Nova Scotia	58

Land Rover

1	British Columbia	67
2	Alberta	63
3	Nunavut	59

Lexus

1	Ontario	66
2	British Columbia	64
3	Alberta	64

Lincoln

1	Saskatchewan	68
2	Alberta	62
3	Ontario	60

Maserati

1	Ontario	65
2	Nunavut	63
3	Quebec	63

Mazda

1	Nova Scotia	62
2	Prince Edward Island	61
3	British Columbia	59

Mercedes-Benz

1	British Columbia	67
2	Ontario	66
3	Quebec	64

MINI

1	British Columbia	64
2	Quebec	62
3	Ontario	59

Mitsubishi

1	Newfoundland and Labrador	70
2	New Brunswick	63
3	Manitoba	56

Nissan

1	Yukon Territory	79
2	Prince Edward Island	57
3	Manitoba	53

Porsche

1	British Columbia	67
2	Quebec	65
3	Ontario	62

RAM

1	Yukon Territory	69
2	Northwest Territories	66
3	Nunavut	58

Scion¹

1	Nunavut	65
2	Ontario	62
3	British Columbia	60

smart

1	British Columbia	71
2	Quebec	63
3	Ontario	59

Subaru

1	Yukon Territory	74
2	Quebec	59
3	New Brunswick	58

Tesla

1	Quebec	68
2	British Columbia	65
3	Ontario	63

Toyota

1	Yukon Territory	75
2	Prince Edward Island	61
3	New Brunswick	57

Volkswagen

1	Quebec	68
2	Nova Scotia	68
3	Prince Edward Island	56

Volvo

1	Quebec	66
2	Alberta	62
3	British Columbia	61



* Using a mathematical score that takes into account the mean and standard deviation of traffic to our sites, these rankings not only show the top provinces and territories for each brand but a score to indicate where that brand falls on the spectrum of consumer interest.

1. Shopping data will be reported under Toyota in 2017

Case Studies

WORTH ITS WEIGHT

How Native Advertising Is Proving To Be The Premier Ad Format



Since its introduction, native advertising has been heralded for its seamless integration and high-impact performance by advertisers and publishers alike.

And it makes sense. Native is designed to provide a more immersive experience than standard display. Jumpstart's newest native products, Xcelerate; Brand POV (Point-of-View); and Suggestive Selling are built to accommodate multiple brand assets and are positioned to run in placements where both audience interests and advertising goals align. And the numbers continue to back this up. Last year alone, these three units had an engagement rate that was six times higher than standard display units. Native video continues to perform particularly well—especially in shorter form. The average completion rates for videos less than one minute were 36% higher than those that ran longer than one minute. And even with lower completion rates, longer form videos are still keeping a consumer's attention for an additional 45 seconds, on average.

While native and standard ads are different, many experts agree that the content strategy behind both remains the same. Jumpstart's Vice President of Publisher Development and Product, Aaron Serrao, notes that "like all advertising, native must be relevant and useful to the consumer." And he adds, "native content, specifically, needs to be clearly labeled, and not only look and feel like editorial, but also be contextually relevant to the editorial content that surrounds it."

LATEST AND GREATEST Jumpstart's Newest Native Products

XCELERATE



What Is It?

In-feed brand promotion

Where It Appears/How It Works

This native ad is placed within editorial—and is made to look like editorial content—with rotating headlines and photos to generate the greatest consumer engagement.

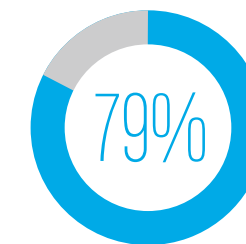
The Benefit

Allows an advertiser to tell its unique vehicle/brand story with video, copy, photos, and shopping tools.

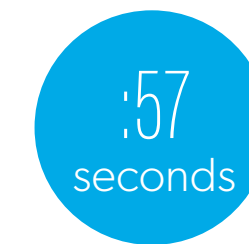
2016 Insights¹

- » Xcelerate exceeded industry benchmarks for video completion by 23%
- » Average time viewing Xcelerate content (57 seconds) also surpassed average display benchmarks by 13%

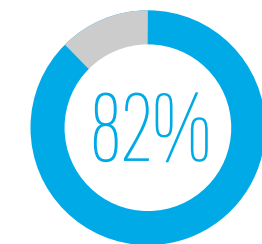
Engagement Rate



Time On Content (Avg.)



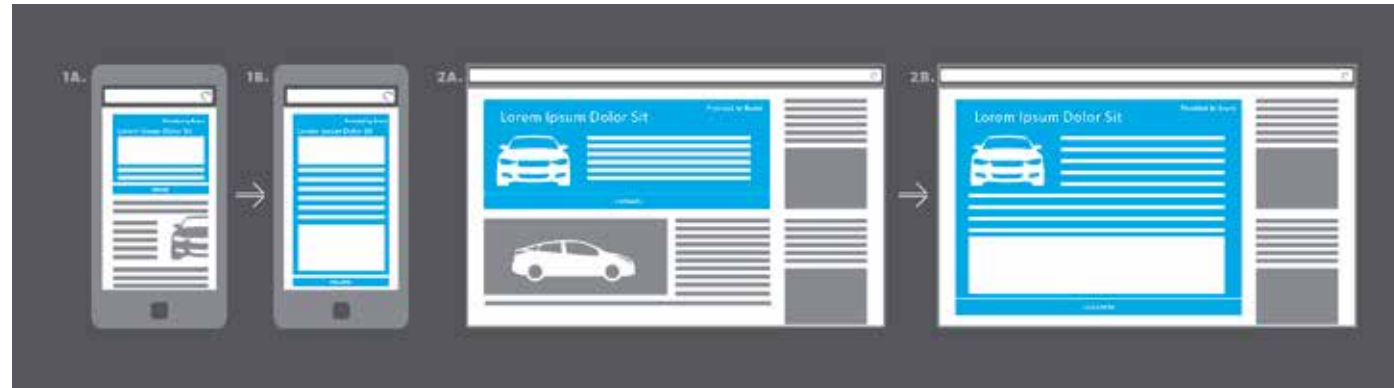
Video Completion (Avg.)



* All benchmarks are based on Nativio Publisher Direct Sold Campaign Metrics, Q3 2016 unless otherwise stated. All analytics are from Jumpstart Campaign Analytics unless otherwise stated. Engagement Rate is defined as the percentage of visitors who remain on the sponsored page for :05 or more. Click-To-Open Rate is defined as the percentage of impressions where the visitor opened or expanded the unit. Click-Through Rate is defined as the percentage of impressions where the ad was clicked.

1. Google Rich Media Display Benchmarks. Vehicle Brands, January – November 2016

BRAND POV



What Is It?

In-content brand voice that also has a 'click to expand' option

Where It Appears/How It Works

Brand POV lives within model research page content (e.g. articles, buyers guides, reviews). Upon expanding the ad, consumers are able to engage with content without leaving the page.

The Benefit

Allows an advertiser to tell its vehicle/brand story with video, copy, photos, and shopping tools—and keep consumers engaged with content on its page.

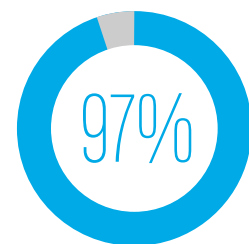
2016 Insights

- » Click-to-open/expand rate (CTO) for Brand POV units on Jumpstart was four times greater than the automotive benchmark for native placements
- » Average time spent on Brand POV was 48% greater than time spent on other automotive native placements

Click-To-Open Rate



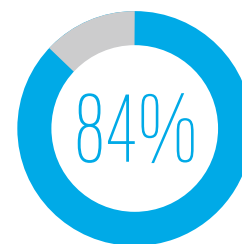
Engagement Rate



Time On Content (Avg.)



Video Completion (Avg.)



89%
Short Form (<:60)

64%
Long Form (>:60)

SUGGESTIVE SELLING



What Is It?

Guided vehicle discovery

Where It Appears/How It Works

Brands sponsor a category and its generic icon is replaced with a vehicle photo and model name so that it stands out against all unsponsored icons. When the visitor clicks the icon, they are taken to that sponsored category landing page, which features the vehicle's hero image and accompanying ads (in standard sizes) around the content. Suggestive selling appears on homepages and new car landing pages.

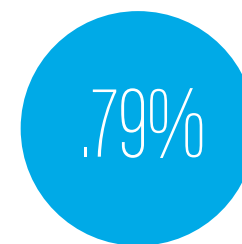
The Benefit

Helps drive KPIs and increase consideration. In other words, someone shopping for a sedan may be more inclined to research a brand's particular model if an OEM has sponsored (actual photo and model name) that category.

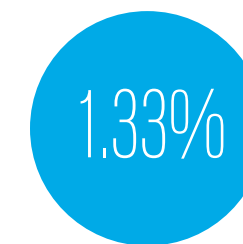
2016 Insights

- » Click-Through Rates (CTR) on category landing pages from suggestive selling were nearly four times greater than the media CTR on standard category sponsorships
- » Truck, SUV, and sedan categories were the most frequently clicked suggestive selling icons in 2016

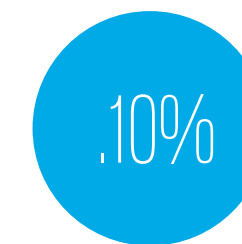
Suggestive Selling Icons CTR



Category Landing Hero Image CTR



Additional Category Landing Sponsored Media CTR



Check out Jumpstart's complete suite of native products: visit jumpstartauto.com/ad-specs-demos

* All benchmarks are based on Nativio Publisher Direct Sold Campaign Metrics, Q3 2016 unless otherwise stated. All analytics are from Jumpstart Campaign Analytics unless otherwise stated. Engagement Rate is defined as the percentage of visitors who remain on the sponsored page for :05 or more. Click-To-Open Rate is defined as the percentage of impressions where the visitor opened or expanded the unit. Click-Through Rate is defined as the percentage of impressions where the ad was clicked.

4 KEY CANADIAN AUTO SHOPPING TRENDS

From budget-conscious consumers who value convenience features to Millennial shoppers who look for brand “experiences,” when it comes to auto shopping, mindsets vary greatly. Here are just a few of the differences in the ways Canadians are researching their next vehicle purchase.

Premium Shoppers Want High Tech And Comfort, Budget Consumers Are Willing To Pay More For Convenience Features



vs.



Turn More To Family And Friends For Shopping Advice

Rely On Third-Party Rankings And Reviews Throughout The Process

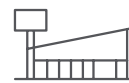
Budget Shoppers Plan To Spend Less Than \$40K On Their Next Car, While Premium Shoppers Plan To Spend More Than \$40K

Experiences Are More Important For Millennials And They're Willing To Pay For Them

MILLENNIALS (18 – 34)

vs.

ALL OTHER AGE GROUPS (35+)



Look For Experiences, And Enjoy The Dealership Visit



Think Of The Dealership Visit As Purely Transactional

WHAT THEY ARE EXPECTING TO SPEND ON THEIR NEXT VEHICLE

\$40 – 80K

\$20 – 40K

Practical Matters
When asked what information they need most to help them make their purchase decision, both groups ranked these as the top three keywords:
1. Price 2. Fuel Efficiency 3. Features

Men And Women Look For Similar Features Like Safety And Comfort/Convenience, But...



vs.



Men Value Blind Spot Assist And Voice Recognition Technology

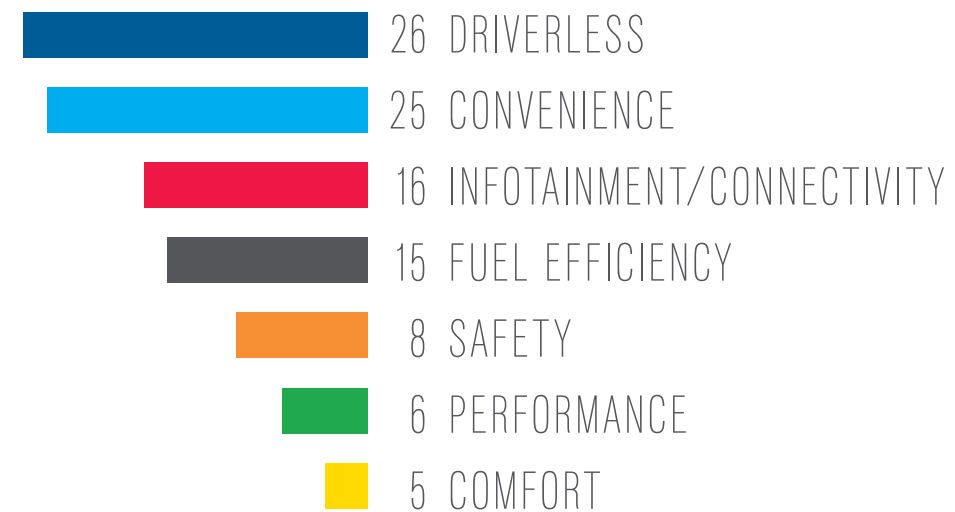
Women Look For Built-In Vehicle Tracking And Night Vision With Pedestrian Detection

Even When They Earn The Same Income, Men Are More Willing To Spend More On Their Next Purchase

When Given 100 Points To “Spend” ...



Because Shoppers Expect Vehicles To Come Well-Equipped With Safety Features. They Would Use More Than Half Their “Budget” On Features Such As: Driverless, Convenience, And Infotainment/Connectivity



TODAY'S AUTO SHOPPERS

How They Research And Why Trust Is So Essential In Winning Them Over

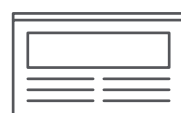
Purchasing a vehicle is a big decision, one that requires both a significant financial commitment and many hours of research. People are constantly cycling in and out of market depending on where they are in their life stage (shifts in income, age, change in family size or length of commute), which can greatly impact how they shop. To better understand their mindsets, Jumpstart commissioned global research firm, Ipsos Connect, to uncover shoppers' underlying motivations, opinions, and sources of information they trust most during the research process.

Early Consideration

Most people start their research knowing whether they will purchase or lease a new or used vehicle (almost 70%), but nearly 32% change their mind when it comes time to buy. A majority begin researching with 3 brands, 2 body styles, and 3 models in mind. As far as timelines go, 93% of people take four months or less—start to finish—to buy or lease a car. And 68% are done in just one month.

We also found that 80% of people research online throughout the entire process—and this jumps to 88% for Millennials.

WOMEN place a greater value on comfort, seating, and safety



UNBIASED CONTENT

rely more on independent research and reviews

30%

hold onto their vehicles for 8 years or more

Women are high-information shoppers who are more likely to consult Consumer Reports.

MILLENNIALS are more likely to change their mind from used to new and are also more interested in tech features



LIFESTYLE

are twice as likely to change vehicles because of a shift in their lifestyle (e.g. increase in income or new addition to the family) and six in ten are in-market every three years

34%

are more likely to consider 4 or more brands

Millennials have a greater desire for infotainment and brands that are highly luxurious.

The dealership experience remains critical, and 76% of people find their dealership to be trustworthy, though they do continue researching vehicles while they're there. Four in ten use a mobile device at a dealership, and that jumps to two-thirds for Millennials, and 83% for men in the Millennial generation.

Because of the shifting demographics in the U.S., auto marketers are always looking to gain deeper insight into the evolving research landscape and how key demographics—Women, Millennials, Hispanics, and Asians—shop for cars. Here are some highlights of what we uncovered:

ASIANS are researching new cars more than other groups



INFLUENCE

100% consider reputation for excellent quality either a "nice to have" or a "must have"



are most interested in luxury brands and more than 50% consider an Asian brand

Asians are the least likely to turn to magazines or newspapers during their research process, and are also the least trustful of the dealership they purchase from.

HISPANICS tend to buy new over used—especially younger men (71% vs. 29%)



REPUTATION

Hispanics place brand reputation higher on their "Top Influencers to Purchase" list, just below quality and reliability



passenger seating is a "must have" for 65% of Hispanic shoppers

Hispanics often hold onto a vehicle and pass it down to a family member instead of trading it in, making trade-in offers less relevant to this group.

The Bottom Line

Emotional. Rational. Educated.

Buying a vehicle is both a rational and emotional decision that needs to "feel right." When consumers feel educated, they feel more empowered, secure, and comfortable with their entire auto shopping process.

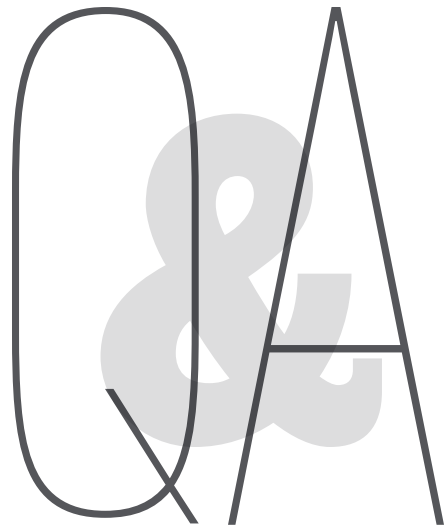
Pricing.

Fair and transparent pricing is key. People don't want to feel blindsided by hidden costs and are skeptical of advertised pricing and offers that contain multiple caveats and disclosures. At the end of the day, the majority of consumers find good value more important than paying the lowest price.

The Dealership Matters.

It's the brand's responsibility to establish trust and credibility, but dealers are the physical extension of the brand—and ultimately the point where emotion and logic meet. Customer service, convenience, respect of time, and fair and transparent pricing are the critical components that consumers tie to dealership satisfaction. Consumers need to feel they're having an exceptional experience from beginning to end.

Perspectives And Predictions



PUBLISHER PERSPECTIVE

Three of our editors offer their take on some of the biggest trends driving the industry, including how driverless technology is informing their editorial and how they are evolving their site design and technology strategy to meet the needs of today's auto shopper (AR/VR-powered reviews aren't just a pipe dream anymore).



Joni Gray
Editor-in-Chief
autobytel
Your Lifetime Automotive Advisor

Joni's unique insight into car buying comes from an extensive automotive background that includes more than a decade of advertising management at Mazda, Hyundai, and Honda and 15 years in editorial management at Kelley Blue Book, Autotrader, and the *Los Angeles Times*. In 2014, Joni was voted president of the Motor Press Guild. She is currently on the jury of the prestigious North American Car & Truck/Utility of the Year Awards.



Eddie Alterman
Editor-in-Chief
CAR & DRIVER

Eddie oversees all editorial aspects of the *Car and Driver* brand and has relentlessly expanded it into digital, mobile, and social platforms while reinvigorating the print magazine. Prior to joining *Car and Driver*, Eddie founded two automotive publications—*MPH* magazine and automotive-lifestyle website *MotiveMag.com*—while serving as the car columnist for *Men's Journal* and contributing to *The New York Times*. Eddie lives with his wife, two daughters, and dog in Franklin, Michigan.



Jamie Page Deaton
Managing Editor



As part of the team that launched the *U.S. News* car rankings in 2007, Jamie oversees the addition of used-car rankings and leads the team's annual rankings of Best Vehicle Brands, Best Cars for the Money, and Best Cars for Families. Jamie is a juror for the North American Car & Truck/Utility of the Year Awards and is turned to regularly for her expert industry commentary and for buying advice for everyday car shoppers.

As driverless technology gains momentum, how do you envision publishers changing their content strategy?



JG: So many publications, including ours, are already doing a great job of clearly communicating what the new autonomous technologies can do now and how much more they will evolve in the coming decade. As with most topics that are highly technical, the average car buyer does not want to get too deep into software specifications of autonomous cars but wants to know about the abilities and safety benefits of the cars that will "drive them."



EA: This is a primary area of confusion for a lot of consumers—even car enthusiasts—and it's our job to separate the truth from the hype. Our dedicated automobility blog looks at these issues from a 360-degree perspective, with a focus on consumer benefits and costs. I believe many more automotive outlets will be folding coverage of autonomous technologies into their editorial offerings.



JPD: We're answering the challenge posed by (Advanced Driver Assistance Systems) ADAS and autonomous systems the way we handle all other aspects of car buying: by educating the reader. We also recognize that the push toward autonomy means consumers will be less focused on how the car drives and more focused on interior features. Our reviews always include a rundown of available infotainment and connectivity features, as well as advice about which systems are worth paying extra for.

How are you approaching marketers' continued push for editorial support through native and branded content?



JG: Giving honest information to in-market car buyers is our stock and trade; native advertising simply adds value to our communication. As content opportunities that enhance what we already

do well come along, we take them—as long as they honestly inform and excite a new- or used-car buyer.



EA: If it's done right, native/branded content can be a real asset to consumers, offering a deeper look at a vehicle or technology than pure editorial coverage usually provides. Doing it right means making sure the source of the information is clear. But "native/branded" is simply a new term for something we've been doing for decades, and we've gotten good at delineating between a manufacturer's information and editorial guidance.



JPD: No matter who is sponsoring or requesting the content, our goal is to help people buy the right car. We hold ourselves to the same high editorial standards regardless of who is requesting the content, so that the partners we work with can be sure our branded and native content has the same quality as all other content types on our site.

Do you think vehicle integration of advanced technologies such as AI/conversational computing (e.g., Amazon's Alexa, Apple's Siri) and biometrics (e.g., a car detecting a driver's stress level and playing calming music) will benefit consumers? If so, how?



JG: I equate these types of features with all other technologies that are now becoming easier for home use, such as blood pressure monitors and safety cameras. Since your second home is also your car, why not take this type of technology with you while you drive? Today, people are like turtles—they carry their home on their back with the help of technology.

As carmakers embrace this concept, they will only create goodwill and differentiate themselves by offering helpful life hacks for an aging and more tech-accepting car buyer.

EA: These new technologies, if applied properly, have the potential to alleviate driver distraction and frustration—most of which comes from in-car technologies in the first place! So it is crucial that these technologies are highly refined by the time they appear in the cockpit, in order for them to truly help the driver, not further frustrate him or her.

JPD: Given how endemic distracted driving is, the integration of conversational computing in cars is a boon for consumers. I know that when I'm testing a car, the ability to simply say, "I'm cold" and have the heat turned up, rather than fumbling through touchscreens, is a much better—and safer—experience. In a way, having a voice-controlled system in the car is akin to having a copilot who can take over some of the secondary comfort and convenience functions for you, leaving you free to keep your eyes on the road and your hands on the wheel.

Now that auto manufacturers are investing more heavily in augmented and virtual reality, are publishers also considering testing this technology for things like reviews, buying guides, and owner manuals?

JG: We have already discussed the idea of using virtual reality on our sites, so it is certainly not just a pipe dream anymore. Many online publishers are considered "tech companies," with more employees serving in technology roles than any other post. When a new site technology becomes available, websites consider it strongly, especially given that most of our visitors come to us via their mobile devices. Our data experts also happen to be car enthusiasts, so we have the best of all worlds to offer car buyers on our site—right down to the make/model level.

EA: AR and VR will be very useful tools in our mission to demystify the automotive landscape, by providing a visual representation of a given car's features and benefits. Because the cost of these technologies is decreasing, the time to experiment is now, and we are doing so. I foresee a day when presenting AR or VR reviews of all cars will be compulsory, just as written reviews of all makes and models are compulsory now.

JPD: I can't speak for other publishers, but we're not exploring AR or VR yet—although I do love watching people experience it.

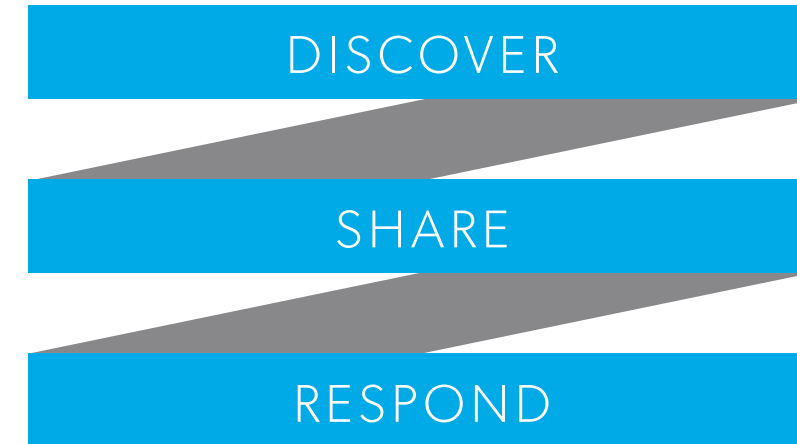


Image Source: audi.com

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 [@JumpstartAuto](https://twitter.com/JumpstartAuto) [#jumpstartinsights](https://twitter.com/JumpstartAuto)

THE CHANGING FACE OF LOYALTY

How Brands Are Fighting To Hold On To Customers Who Are Always Looking For Something New & Different

Today's consumer is constantly on the lookout for the next big thing, whether it be a career opportunity, a device (Apple releases, on average, one to two new iPhones per year), or a vehicle. This is especially true of younger generations who grew up in a highly connected world. This connectedness has allowed them to be more transient; even when they are a world away from friends and family, technology allows them to feel close. It's really no surprise that staying up to date with technology is the most important factor in this conversation. And while the notion that a product is "built to last" still carries value, even when our products are in fine working order, we want to upgrade for the latest features.

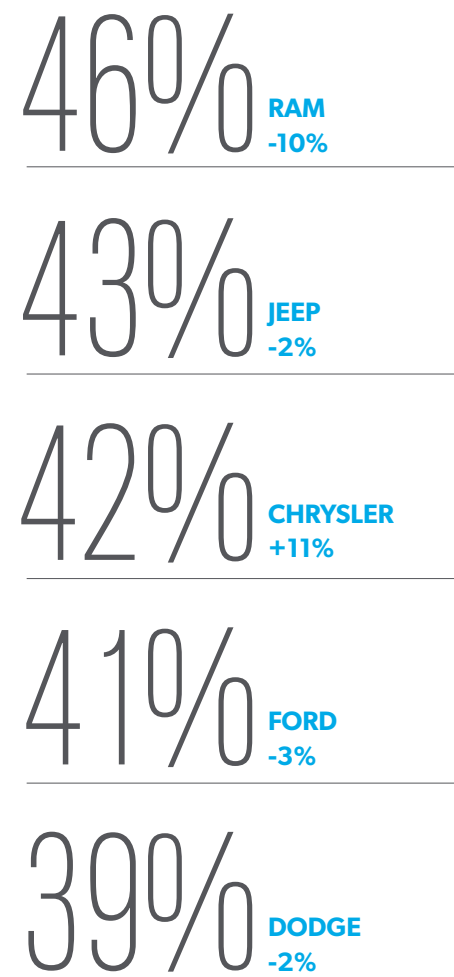
This cultural shift is particularly evident within the auto industry. Whether it's trying a different model or trim level or switching brands completely, people have a fundamental desire to experience something new. This makes achieving—and maintaining—brand loyalty difficult for automakers.

A Look At Automotive Shopper Loyalty

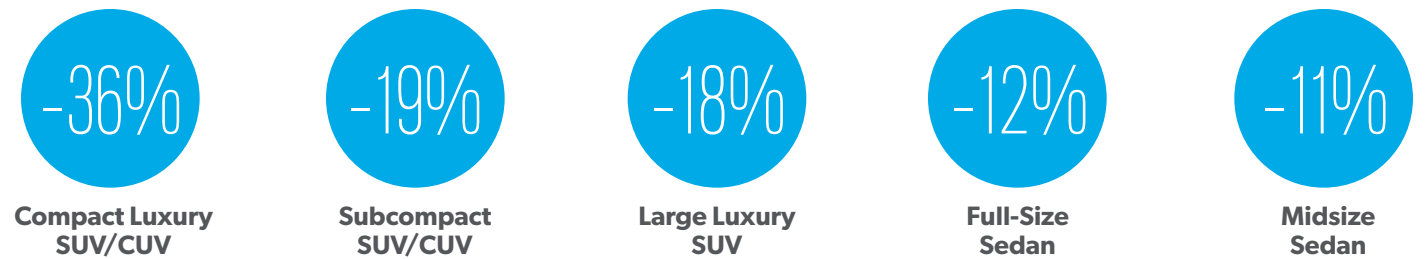
When we look at online shopping behavior across Jumpstart sites, we see that shopper loyalty is down, and the number of consumers researching different brands is growing. In fact, 65% of brands saw declines in loyalty (meaning consumers on our sites are only researching vehicles within a given brand) in 2015 and 2016. And despite nearly 53% of customers repurchasing from a brand they already own¹, we have found that the shopper loyalty rates cap at 46%, and go down from there. Consumers' urge to try different body styles is driving this movement as well. Shopper loyalty has decreased in eight out of 11 body styles across Jumpstart since 2014, with the two most popular segments, SUV/CUVs and Sedans, seeing the largest decreases (-6% and -4%, respectively). Interestingly, the five sub-segments with the largest declines in loyalty also fall within these body styles.

65% of brands saw declines in loyalty in 2015 and 2016

Brands With The Highest Shopper Loyalty



LARGEST DECLINES IN VEHICLE SEGMENT LOYALTY SINCE 2014



Not only are we seeing this trend in the way people research vehicles across our sites, we're also hearing it from consumers first-hand. During recent focus groups and in-home interviews we conducted in partnership with Ipsos Media CT, one woman described her desire for change, "It would be exciting to drive an SUV or CUV rather than my old minivan." And baby boomers, in particular, mentioned needing a vehicle that sits higher off the ground, something they can more easily get in and out of, and were more open to different models than they'd ever been before. What's more, while many consumers we spoke with told us that negative ownership experiences and/or word of mouth from friends and family might influence their decision to switch brands, some satisfied owners admitted that they might purchase or lease a different brand simply out of curiosity. During an in-home interview, we spoke with one satisfied Toyota owner who summed up his desire to drive a new vehicle, "I'm probably not going to drive a hundred vehicles in my lifetime, so I'll buy something besides a Toyota next time."

Embracing Change

Of course, there is no simple solution. But automakers are continuing to find ways to grab the attention of new customers and maintain the interest of the ones they

have. We see this in everything from the way brands are expanding their lineups and offering record-high incentives, to the way the "old guard" automakers have evolved their businesses to adapt to disruptive technology and business models. But the consumer mindset will keep shifting, which means they must always stay one step ahead of the game.

"I'm probably not going to drive a hundred vehicles in my lifetime, so I'll buy something besides a Toyota next time."

Rapid transformation of technology continues to fuel consumers' always-on lifestyles and the belief that change is something that is inherently good. They no longer run away from the new and different, they run toward it and fully embrace it.

And to attract new customers and keep loyal ones happy and—hopefully—advocating for their brand, automakers must do the same.

* 2017 IHS Markit rankings from "GM Tops IHS Loyalty Rankings," Auto Remarketing, January 2017 <http://www.autoremarketing.com/trends/gm-tops-ih-loyalty-rankings>

1. Jumpstart Internal Analytics, January 2014 – December 2016

OFF AGAIN, ON AGAIN

Why The Used Car Market Is So Hot



By Libby Murad-Patel
Vice President, Marketing
and Strategic Insights

The used car market plays a crucial role in the overall health of the auto industry, after all, used car sales account for more than double new car sales. But, as of late, the two markets are competing for the same customer base more than ever.

To understand why this is happening, we have to go back to late 2007 and 2008 when the market bottomed out. In the days of the recession, credit was tight, leasing was largely unavailable, new car sales were lower than they had been in more than a decade, and the used car market supply had been tapped to near depletion.

Fast forward to late 2015 and 2016, and we started to see record-breaking new car sales following multiple years of recovery. As the market tends to work in cycles, we're now arriving in the eighth year of a growing new car market, which means growth rates are slowing down. And because new car sales and leasing bounced back so well, there is now a high supply of near-new, off-lease vehicles that are flooding the used car market.

Factors Driving The Increased 'Near-New' Supply Of Used Cars

- 1 Credit availability bouncing back has brought leasing to a compound annual growth rate (CAGR) of 19% since 2009
- 2 As leases come to term, the market has seen record high off-lease volumes for the past five years, surpassing 4 million in 2016
- 3 Off-lease volumes are also the highest they've been in 15 years, but analysts project they still won't even peak until 2020
- 4 High rental fleet purchases over the past couple years that return/recycle every one to two years is also driving this supply

So Why Fear Competition?

The competition in itself isn't a bad thing. But the pricing and credit that drives these markets could be something of concern. What we're seeing today is that manufacturers are spending more money on incentives to keep the new car market affordable and attractive to consumers who could be venturing to the 'near-new' used market. Average incentive spending has surpassed all records and even broke the \$4K mark in 2016. At the same time, with higher supply hitting the used car space, pricing is starting to drop and it's expected to decrease 5% more, on average, in 2017. This could become a problem for manufacturers and dealers as margins begin to shrink.

Secondly, many financial analysts are concerned that the increase in long-term loans and subprime loans could come back to bite us as we've seen in the past. Loan terms have been similar for both new and late-model used cars and the standard is becoming a 72-month term, with 84 months not being unheard of, especially for new cars.

A competitive new and used market could be very beneficial to the consumer, but in order to operate in a stable, responsible way, automakers and creditors need to keep the balance on pricing, loan terms, and credit availability in the subprime. We know the market tends to flow in cycles, but one thing we don't want to repeat is the downturn that we experienced just shy of a decade ago.

Is Consumer Shopping Behavior Changing?

Over the course 2016, we haven't seen a significant change but here are the numbers that we are keeping a close eye on:



More than one-third (35%) of used car shoppers are also shopping and researching new vehicles but only 13% of new car shoppers are considering used



New truck shoppers are most active in shopping for used trucks as well (21%)



Used SUV/CUV shoppers have the highest cross-shopping percentage for new SUVs/CUVs (33%)

LOOKING AHEAD

Jumpstart's Predictions On What's In Store For 2017

Automakers Will Proceed With More Caution Amid Economic Uncertainty

As David Carey, president of Hearst Magazines pointed out in his annual New Year's Salute, "2016 taught the world an important lesson: Expect the unexpected." This statement is particularly true for the auto industry. Despite achieving annual growth in vehicle sales since 2009, history has shown us that we are reaching a plateau, and a downturn is coming. In addition to cyclical changes, we are preparing for an impact—negative and positive—of the new administration's policy changes (e.g., federal emission standards, trade agreements, infrastructure). And, of course, the automotive market is always driven by finance availability and fuel prices. So far, credit has remained widely available to consumers and manufacturer incentives have been higher than ever. But financial analysts are concerned we could be approaching an auto-loan bubble. And while we've enjoyed low fuel prices for a number of years, the market is extremely sensitive to price fluctuations. A shakeup in any of these areas could quickly impact sales, so we expect automakers to be on high alert with policy and market changes and be ready to pivot for any scenario—good or bad.

Experiences Will Become Increasingly Valuable

We now understand that today's consumers gravitate more toward experiences than toward "things." People want access to a level of exclusivity that goes beyond the car itself. This is something high-performance brands have understood for a long time. But now, in addition to unique driving experiences these brands have been offering, we're starting to see more automakers rethink the entire car-buying process and push the envelope on what it means to deliver unique brand experiences. Manufacturers such as Audi, Volvo, and Toyota are testing forms of virtual reality (VR) to help configure, shop, test drive vehicles, and even simulate distracted driving scenarios. And Hyundai recently turned the traditional Super Bowl spot on its head with a "live" production that connected families and military personnel abroad so they could watch the big game together. These brands are breaking the mold and proving that automakers are ready to step out of their comfort zones. When considering that at least half of brand sales need to come from new buyers, we expect more automakers to turn to unique experiences to grab attention.

To Stay Relevant And Reach More Consumers, Automakers Will Continue Expanding Lineups

After the recession of 2008, some brands folded and expected those remaining to cut back on their offerings. And, perhaps briefly, we saw that happening. But vehicle lineups have been growing more rapidly in recent years, a phenomenon that has been evolving and fueling new vehicle sales. Luxury brands have been expanding their offerings to be more accessible to entry-level luxury shoppers (\$30K+); performance brands like Porsche, Jaguar, and Maserati now all have SUVs/CUVs in their lineups. And among mass-market brands, we're seeing more options than ever. Toyota, for example, is building a car to appeal to every consumer: It has approximately 25 vehicles in its lineup and four variations on Prius alone (Prius c, Prius, Prius v, and Prius Prime). In 2016, more than 20 new models appeared on the market, and over the next two years there could be more than 100 new entries. So despite economic forces that may arise, brands are going to continue expanding their offering of styles, models, and trims to stay in the game, reach more shoppers, and, ultimately, drive more sales.

To stay up to date on all Jumpstart news, visit jumpstartauto.com/insights



Image Source: cadillac.com



Image Source: honda.com



Image Source: toyota.com

QA DISRUPTING IN THE AGE OF DISRUPTION

Part of what makes a leader great is not only his or her industry expertise in today's market but also their steadfast gaze into the future and keen ability to plan for what might be just around the corner. Lucky for us, Jumpstart is teeming with people who do just that. From our headquarters in San Francisco to our newest office in Atlanta, Georgia, seven of Jumpstart's brightest talk trust and transparency, tech-savvy "youngsters" who demand change, and how data continues to unlock the mystery of auto shopping.

What would you identify as the most significant change you've seen in our industry in the past 5 years?



Lori Mertz

Data has unlocked the "mystery" of automotive shopping. We now know it's not a neat little funnel but a very human, zigzaggy, rational, emotional journey. We've been able to share these incredible insights with OEMs and create a data product that allows our advertisers a peek into what really happens in a digital automotive shopping environment.



Justin Osborne

Native advertising is an evolution of an ongoing trend in advertising to weave marketing messages into content and conversation. Given the flexibility within the digital medium, there is an incredible opportunity to employ creativity and collaboration to produce something that's meaningful and ultimately useful to consumers.



Choon Choi

The impact technology has had on transportation, from the rise of on-demand ride hailing and car sharing, to mobility as a service.

What do you expect the game-changers to be in the years ahead?



Nick Matarazzo

Trust and transparency. The brands and sites that earn auto shoppers' trust will win.



Francois Thery

Technological innovations and new regulations that will lead to the democratization of self-driving cars.



Choon Choi

The shift in consumer mindset from car ownership to simply getting from point A to point B.



James Tom

Consumers don't always buy the way the dealerships want to sell. The industry is evolving, but in some cases not fast enough. There is definitely an opportunity for a platform that allows dealers to partially or fully transact a car deal online. Despite that, direct communication between dealers and their consumers will remain critical.



Jason "JK" Koenigsknecht

In terms of digital media, attention will become the next metric of our generation. We've measured click because it's a physical behavior that is trackable. But what we're really after is attention, which can be both active and passive. Now, how we define attention will be wild, but I do see it rising up to become a transactional metric.

What are you most excited about today?



Nick Matarazzo

The notion that a car shopper today can experience the essence of a vehicle without actually sitting in it.



James Tom

That the industry is still ripe for disruption. That there is still a lot of opportunity to innovate and make things more efficient.



Jason "JK" Koenigsknecht

The youngsters who could take my job in six months. They grew up with the Internet. They're tech-savvy. They live for experiences. They're risk-takers. They demand change, and as they grow in the workforce, many of their ideals will force change on not just the agencies but the clients they service.



New York City



Nick Matarazzo
Chief Executive Officer & President



San Francisco



Choon Choi
Chief Operating Officer



Francois Thery
Senior Vice President, Finance



Detroit



Jason "JK" Koenigsknecht
Vice President, National Sales



Los Angeles



Lori Mertz
Senior Sales Director, West Coast



Toronto



Justin Osborne
Head Of Sales, Canada



Atlanta



James Tom
Senior Vice President, Dealer Network & Enterprise Sales

“The principle role of a logo is to identify, and simplicity is its means... Its effectiveness depends on distinctiveness, visibility, adaptability, memorability, universality, and timelessness.”

– Paul Rand

JUMPSTART
automotive media

In 2016, we redesigned the Jumpstart logo to satisfy all of the existing expectations of what our original mark stood for...while simultaneously moving the brand forward. And our logo was just the first step.

Go to jumpstartauto.com to see the latest on our complete Jumpstart Automotive Media rebrand.



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