



JAG

JUMPSTART
AUTOMOTIVE
GROUP

INDUSTRY TRENDS AND INSIGHTS



2012 – A LOOK BACK



Welcome to the annual Jumpstart Automotive Group Insights Book—a year in review of digital automotive studies, online car shopping trends and patterns, and industry perspective gleaned from our diverse audience and portfolio of publisher sites.

This robust collection of data is designed to provide our clients with information to execute automotive marketing campaigns with direct, impactful and sustainable results.

Jumpstart is now more than a decade old. And, through all of our publishers and marketer partnerships we've analyzed more online car shopping data than any other automotive advertising organization.

This book was developed to highlight key data and insights, including primary audience demographic and shopping metrics, mobile and social media trends and tips, automotive brand-impact statistics, vehicle segment analytics, regional shopping trends, and more to help marketers understand:

- » The reasons why certain vehicle segments, makes and models generate more shopper interest than others
- » The most important factors influencing buying decisions
- » The marketing initiatives that have proven most effective in increasing shopper interest and driving sales
- » The best ways to capture consumer attention and market share from competitive brands

2012 certainly was an exciting year for the automotive industry. We witnessed the launch of the most innovative mobile and social media marketing campaigns to date, watched automakers leverage digital to mitigate mass recalls, sat front row at the midsize sedan Battle of the Brands, and learned that not all big media investments net big results with online car shoppers.

Our goal is to provide you with more than insights; we want to share best practices that strengthen our programs and partnerships and grow the industry as a whole.

Nick Matarazzo, CEO
Jumpstart Automotive Group



What's Inside

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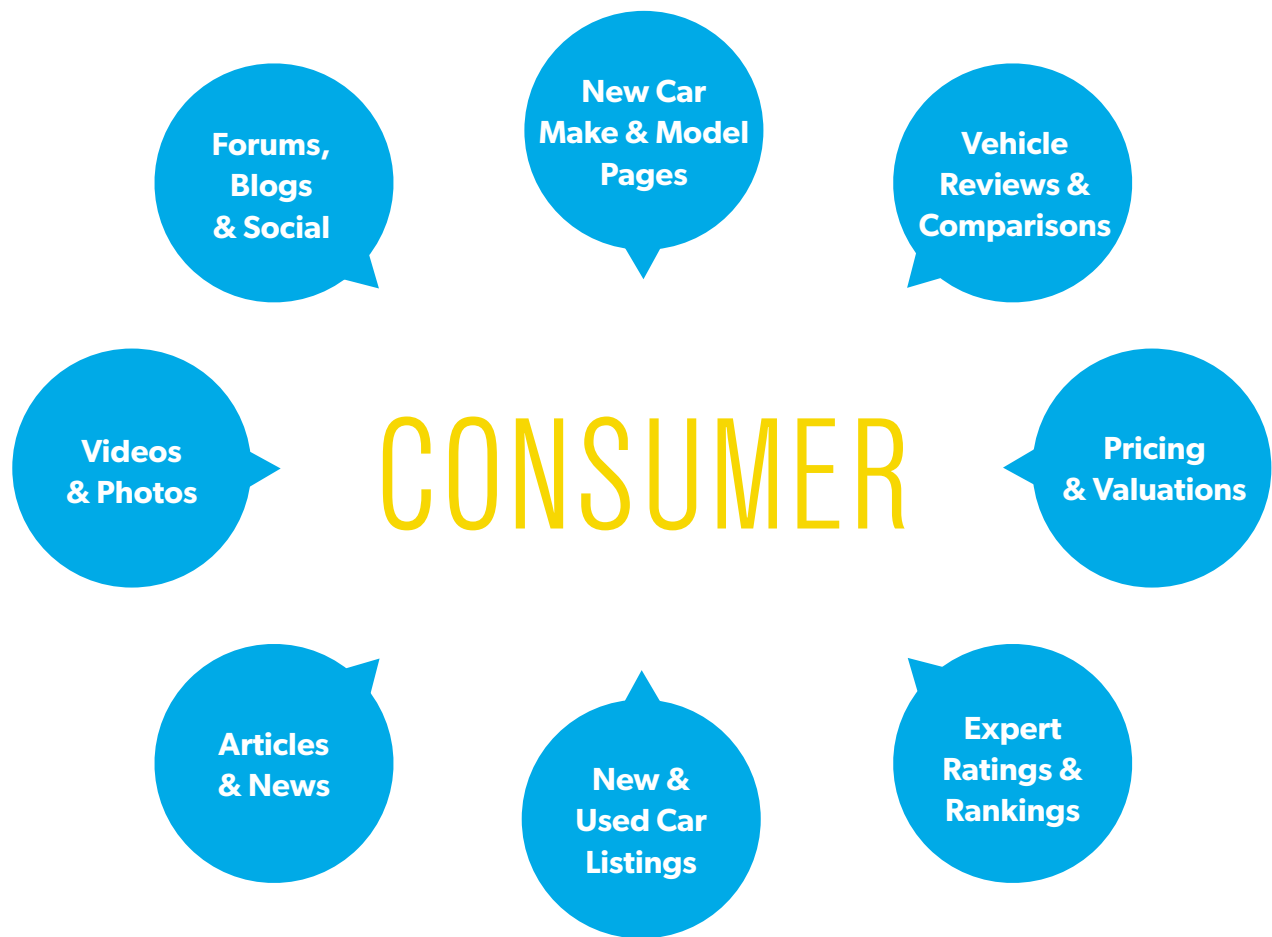
AUD

AUDIENCE

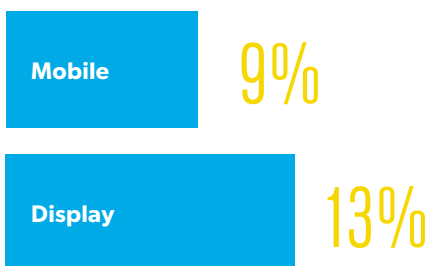
Diverse and Influential
Consumers

Content That Attracts Hand Raisers and Enthusiasts

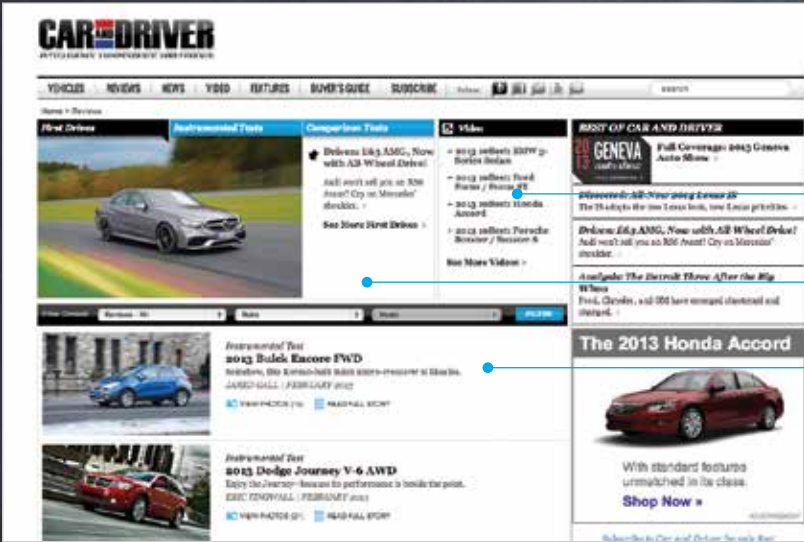
Through the Jumpstart Automotive Portfolio of sites, automotive marketers can reach consumers at all points of the purchase cycle as they engage with a variety of expert content



The Jumpstart Automotive Group audience represents nearly 13 percent of the automotive resources in display and more than nine percent in mobile*



*Source: comScore MediaMetrix December, 2012

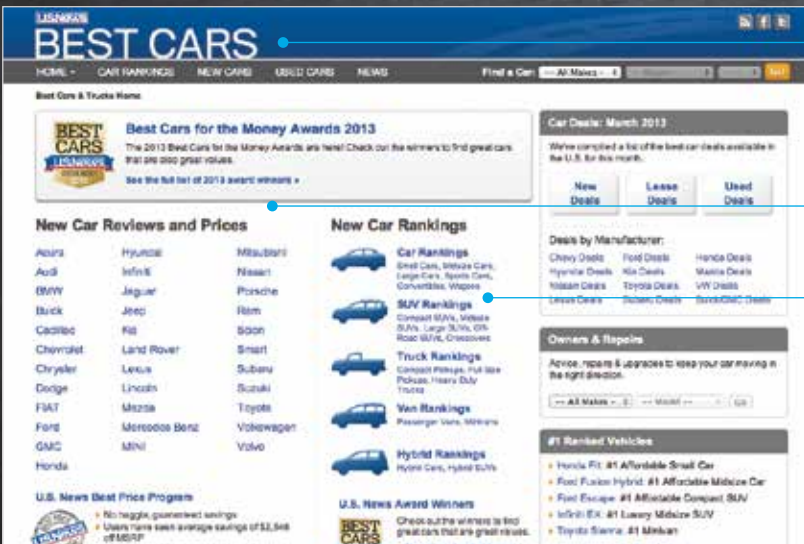


This is a small sampling of the rich content and media available on Jumpstart's portfolio of sites

Videos & Photos

Vehicle Reviews & Comparisons

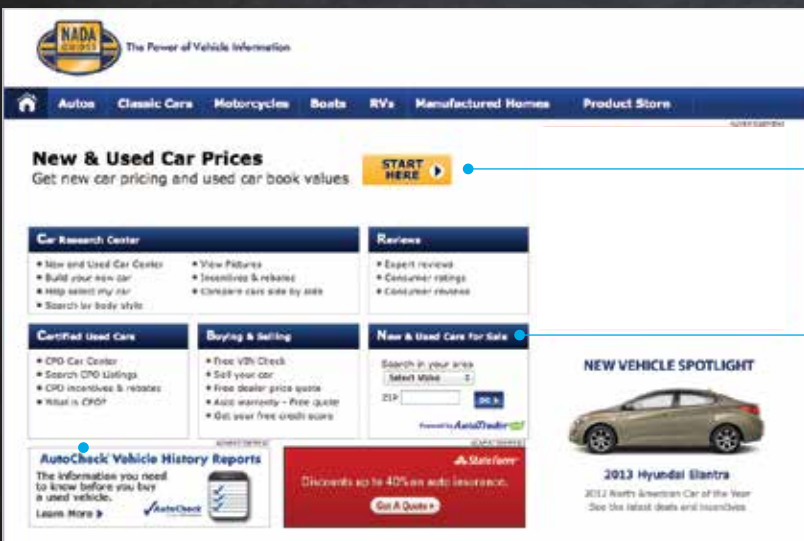
Articles & News



Forums, Blogs & Social

New Car Make & Model Pages

Expert Ratings & Rankings



Pricing & Valuations

New & Used Car Listings

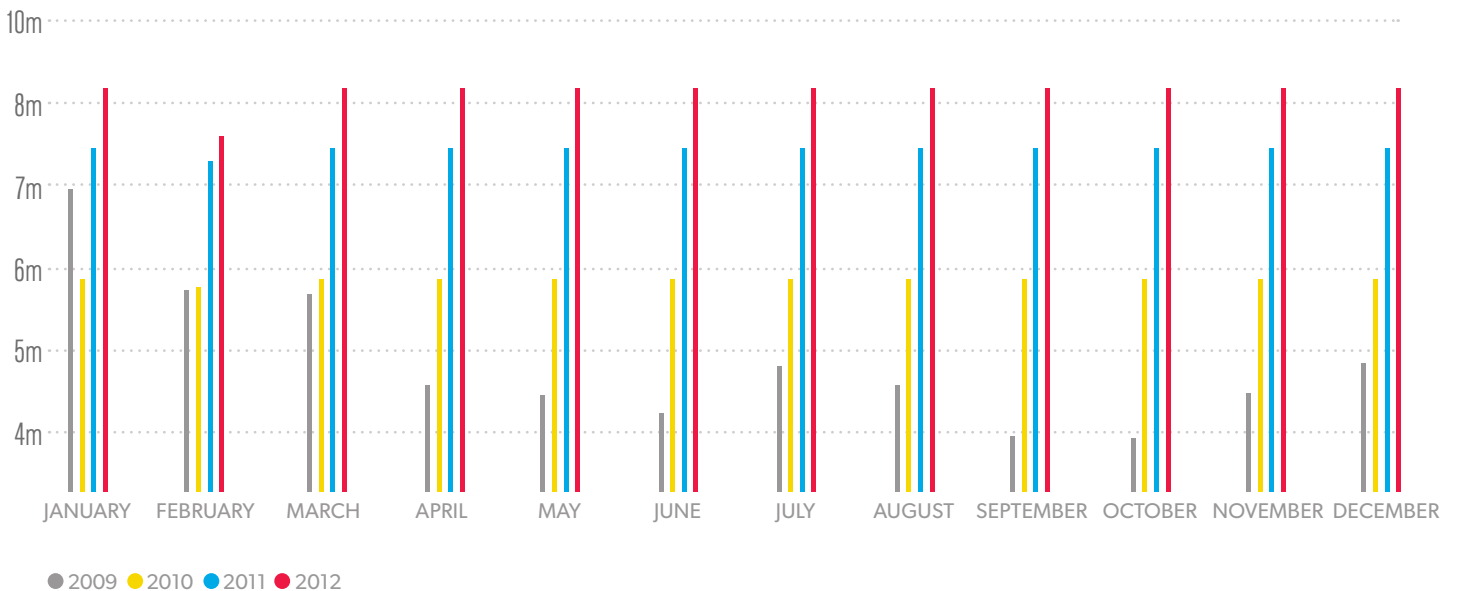
Consistent Audience Growth

Jumpstart has experienced audience growth for three consecutive years

Jumpstart Automotive Group's audience grew nearly 14 percent, 2011 – 2012, and has continued to grow at an average annual rate of 26 percent, 2009 – 2012.

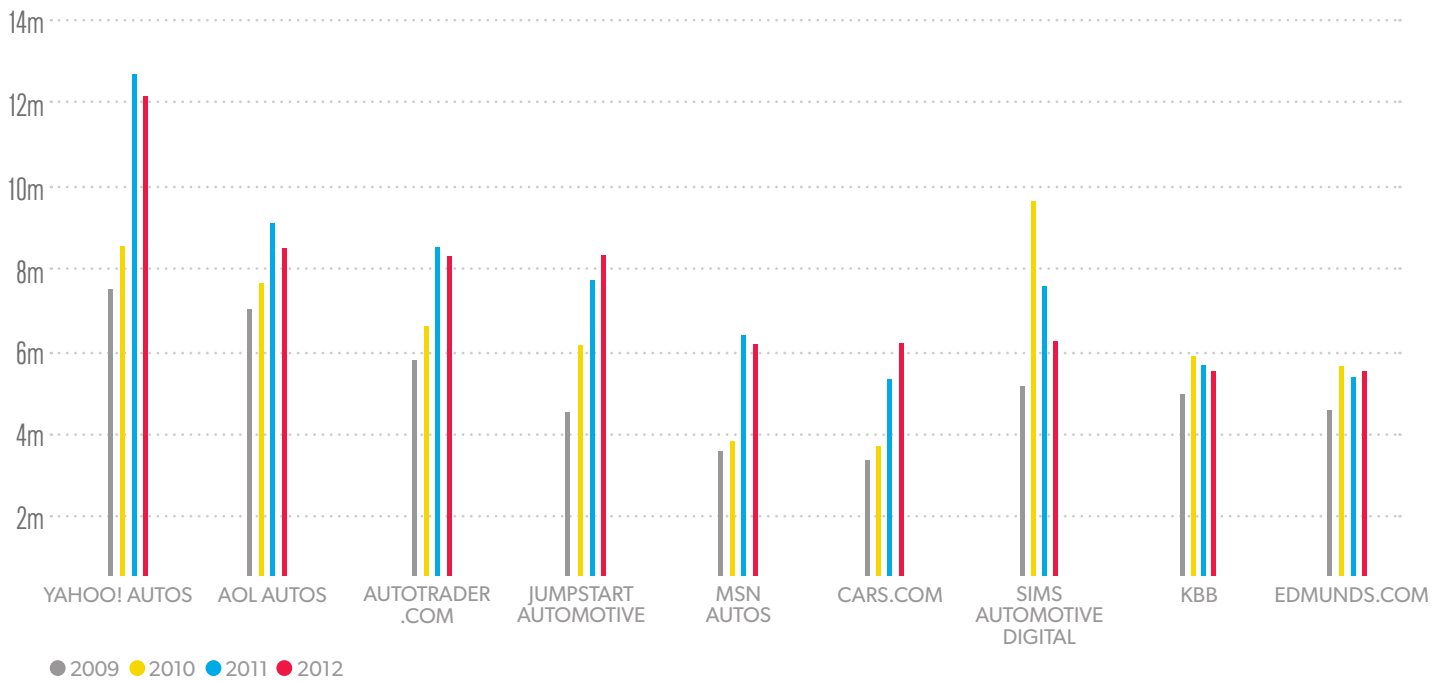
Growth is directly attributed to strategically partnering with high-performing, content-rich automotive publishers with scale. Jumpstart is one of only two competitors who have seen a year-over-year increase for three consecutive years.

Jumpstart Automotive Unique User Volume 2009 – 2012



Source: comScore Media Metrix, December 2012

Average Monthly Unique Users by Competitor 2009 – 2012



**Jumpstart
Automotive has the
highest average annual
growth rate among top
competitors since 2009**

+26%

Source: comScore Media Metrix, December 2012

Cross-visitation to Jumpstart Automotive Sites

⇒ Car shoppers looking for diversified content to help them make more informed car buying decisions increasingly turned to Jumpstart Automotive sites in 2012 after visiting premium third-party sites like Edmunds.com, KBB.com and Cars.com. This marked the third year of cross-visitation growth from other sites to Jumpstart's portfolio of sites.

24%

24% of the competition's unique audience visit Jumpstart's sites

VS.

20%

20% of Jumpstart Automotive's unique audience visit other major auto shopping sites

Jumpstart Dominates in Key Engagement Metrics

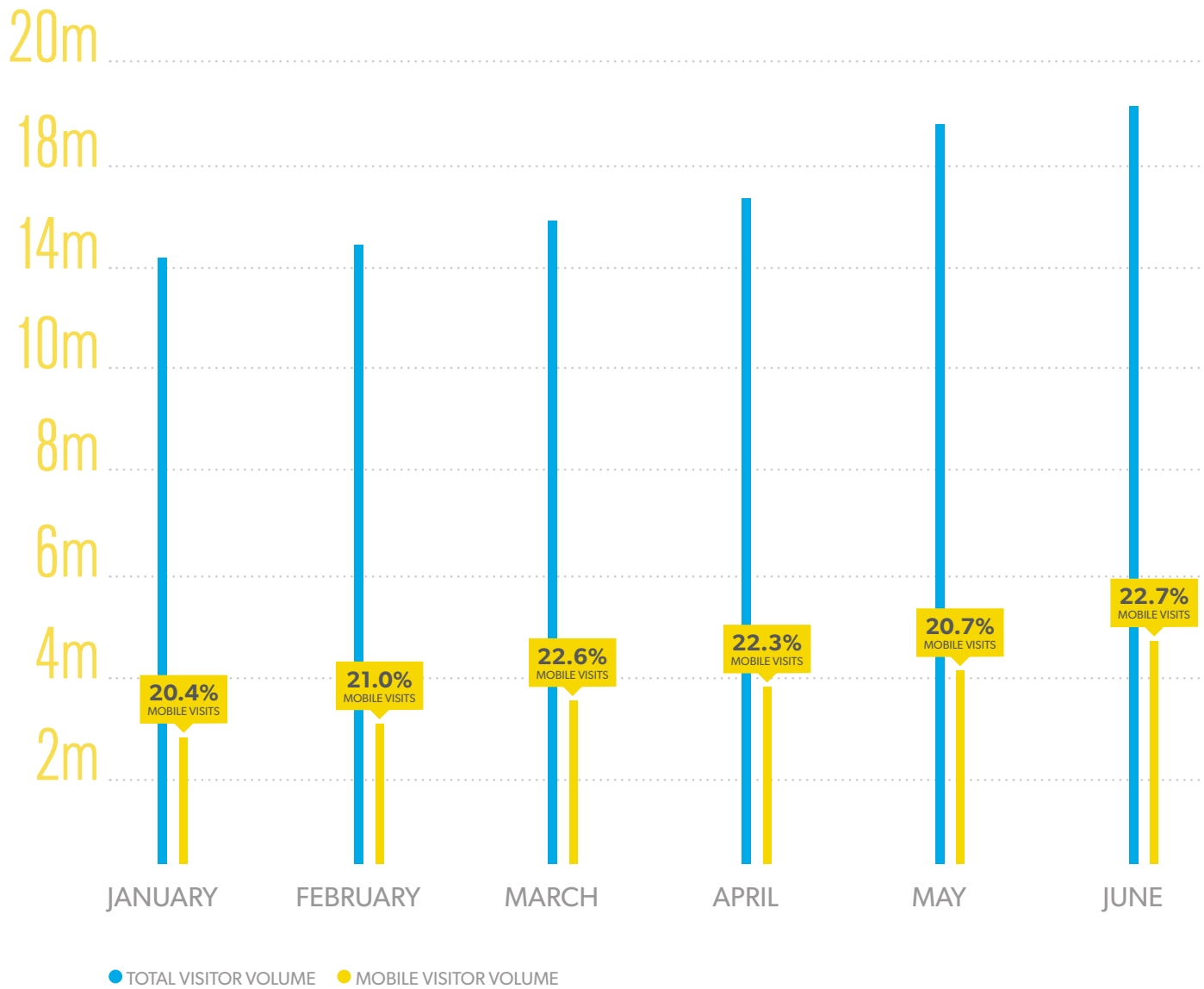
MEDIA	AVERAGE DAILY VISITORS (000)	AVERAGE MINUTES PER VISIT	AVERAGE VISITORS PER VISIT	TOTAL MINUTES (MM)	TOTAL PAGES VIEWED (MM)	TOTAL VISITS (000)
Yahoo! Autos	814	2.3	2.2	62	72	26,834
Jumpstart Automotive	686	3.8	3.4	95	136	25,412
SIM Automotive	570	1.3	4.1	29	44	22,904
AOL Autos	543	1.9	2.4	35	54	18,253
Autotrader.com	464	8.8	2.4	154	244	17,466
Cars.com	401	6.6	2.5	100	141	15,095
MSN Autos	334	3.5	1.9	39	82	10,942
Edmunds.com	222	3.5	1.6	27	38	7,629
KBB	209	5.5	1.7	40	80	7,295

⇒ Jumpstart users spent 67 percent more time on a Jumpstart website than on a SIM Automotive website and 39 percent more time than on Yahoo! Autos' website (on average per visit)

⇒ Jumpstart has the second highest average daily visitors, and, of the top three sites, Jumpstart users spent the most total minutes and viewed the most total pages. These metrics show that the average Jumpstart visitor consumed and engaged with more content than the average SIM Automotive or Yahoo! Autos visitor.

Source: comScore Media Metrix, December 2012

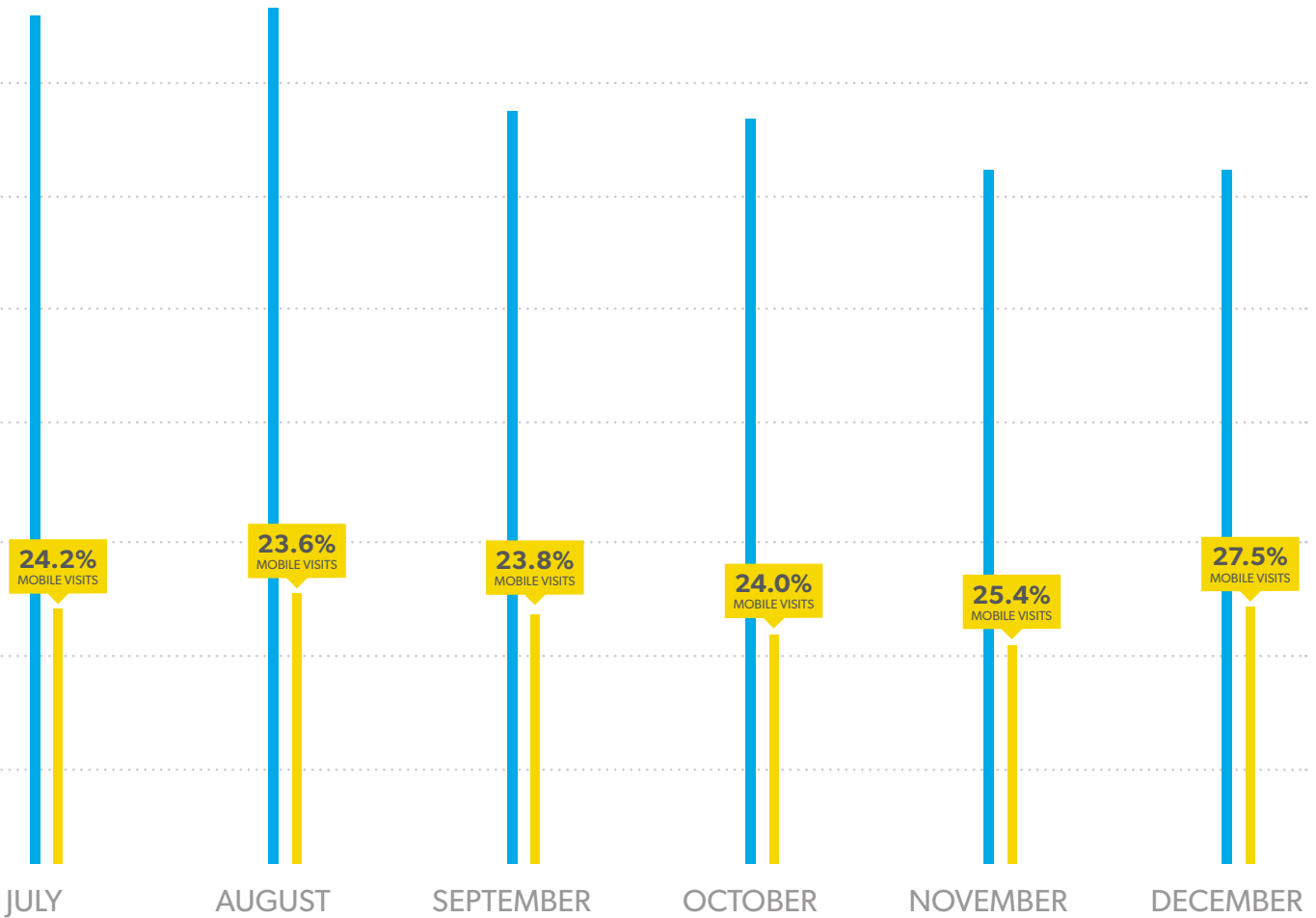
An Engaged and Growing Mobile Audience



⇒ On average, 23 percent of all Jumpstart visits came from a mobile device in 2012

⇒ Mobile visits grew by 20 percent from Q1 to Q4 2012

⇒ Tablets are approximately 36 percent of Jumpstart mobile traffic, and eight percent of all Jumpstart traffic

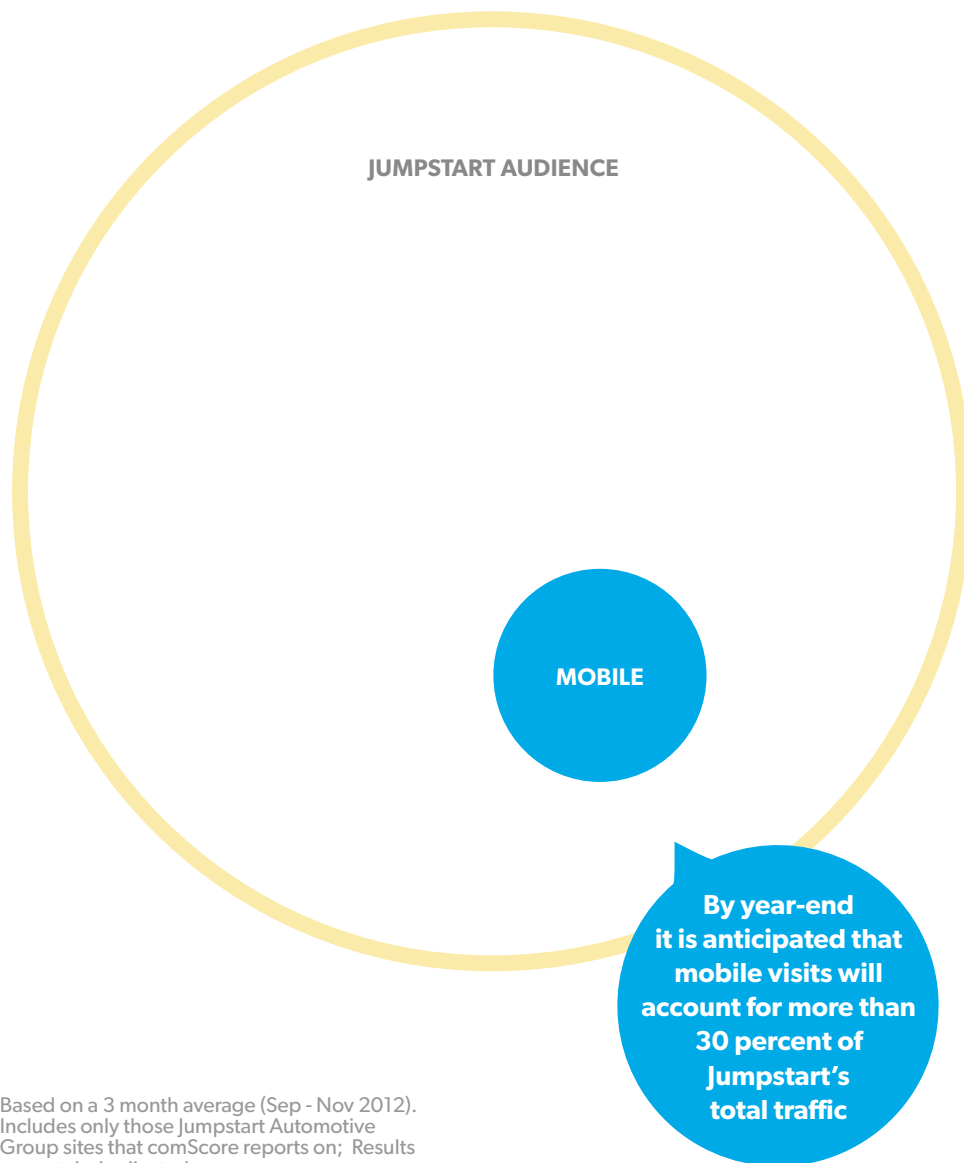


⇒ Engagement is growing nearly four pages per mobile visit

⇒ Mobile visitors averaged nearly three minutes per visit

A Perfectly Positioned Mobile Audience

Mobile visits as a percentage of total visits



30.9%

KBB

28.9%

SIM AUTOMOTIVE DIGITAL

28.3%

CARS.COM

22.4%

JUMPSTART AUTOMOTIVE

21.9%

AOL AUTOS

21.8%

EDMUNDS.COM

16.9%

AUTOTRADER.COM

8.3%

YAHOO! AUTOS

6.4%

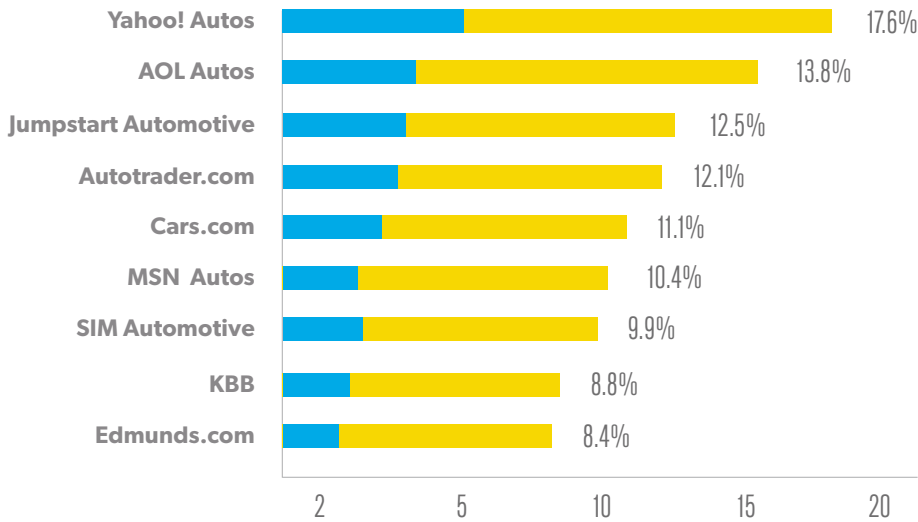
MSN AUTOS

Based on a 3 month average (Sep - Nov 2012). Includes only those Jumpstart Automotive Group sites that comScore reports on; Results are not deduplicated.

Source: comScore Media Metrix, December 2012

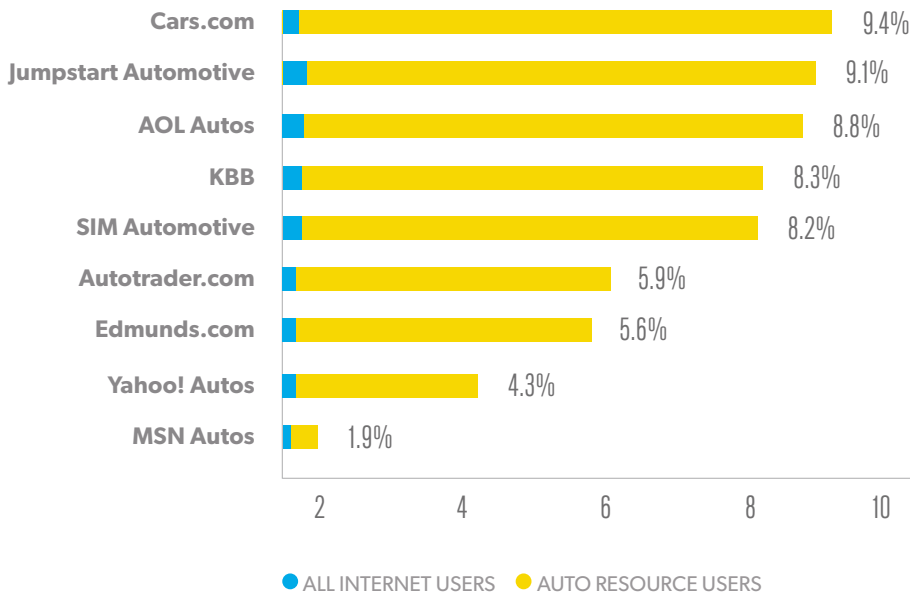
Mobile and Desktop Reach Among Total Internet Users

Reach Among Desktop Users



Jumpstart reaches nine percent of mobile Internet users that visit automotive resource sites, nearly matching Cars.com in mobile auto shopper reach

Reach Among Mobile Users



Source: comScore Media Metrix, December 2012





SHO

SHOPPING
TRENDS

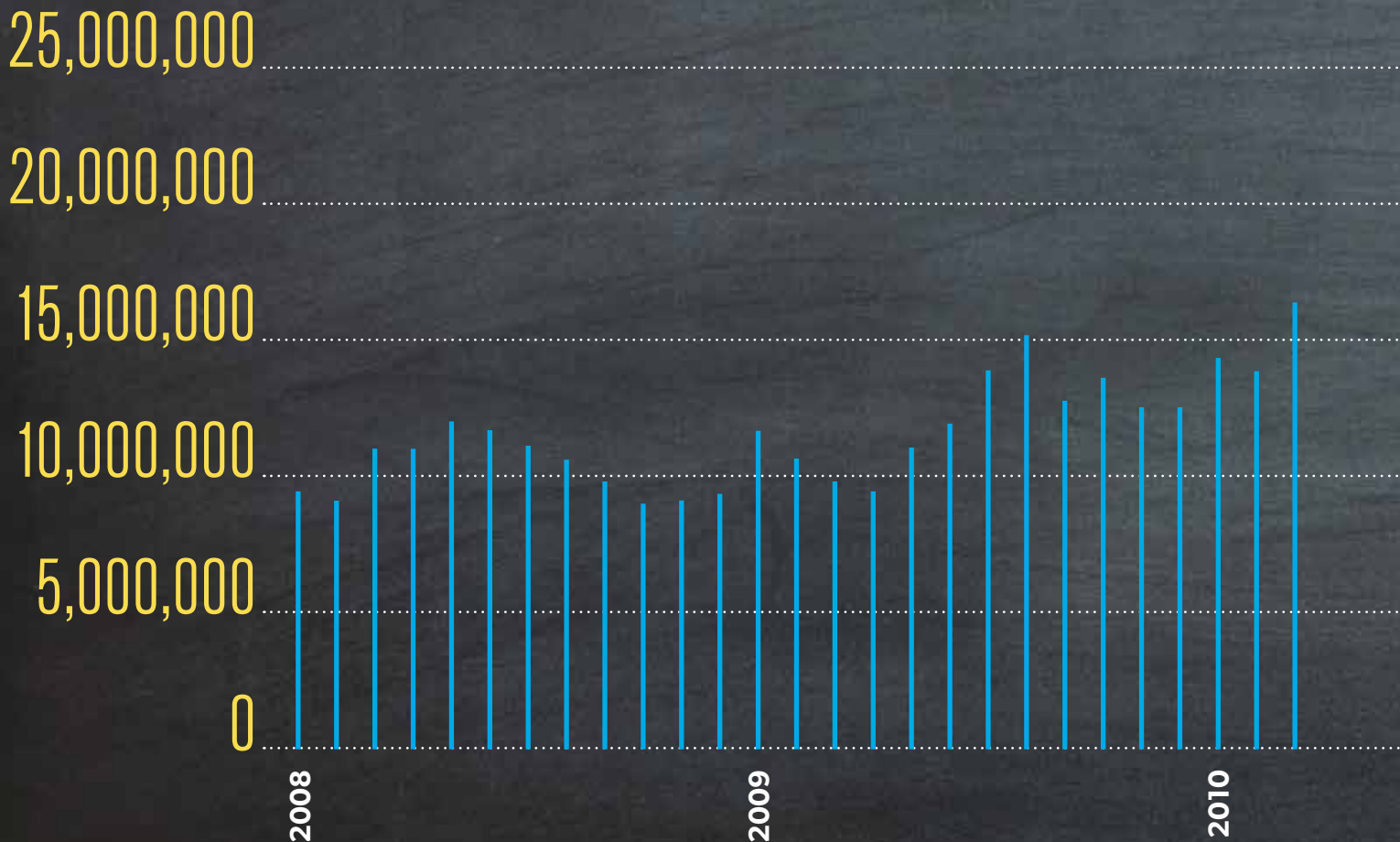
Makes and Models
on the Rise

Unique User Growth Surges Ahead

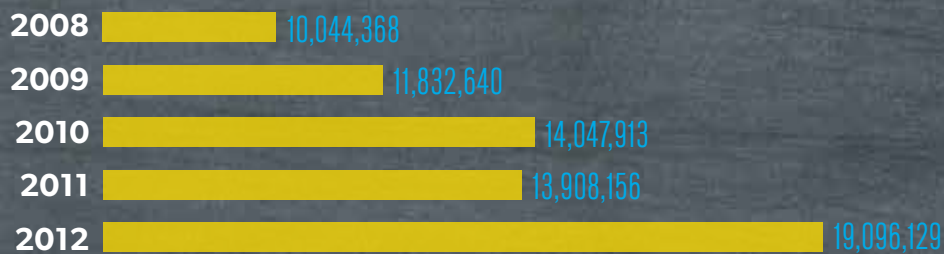
In 2012 Jumpstart saw its largest traffic volume ever with more than 20 million users during the second half

2012 marked the greatest jump in year-over-year traffic since 2008 when a number of new publisher partnerships were formed. April traffic was immediately impacted with the addition of NADAguides.com, and that was sustained the rest of the year with consistent growth from key publishing partners, such as: CarGurus, US News Ranking & Reviews and Car and Driver.

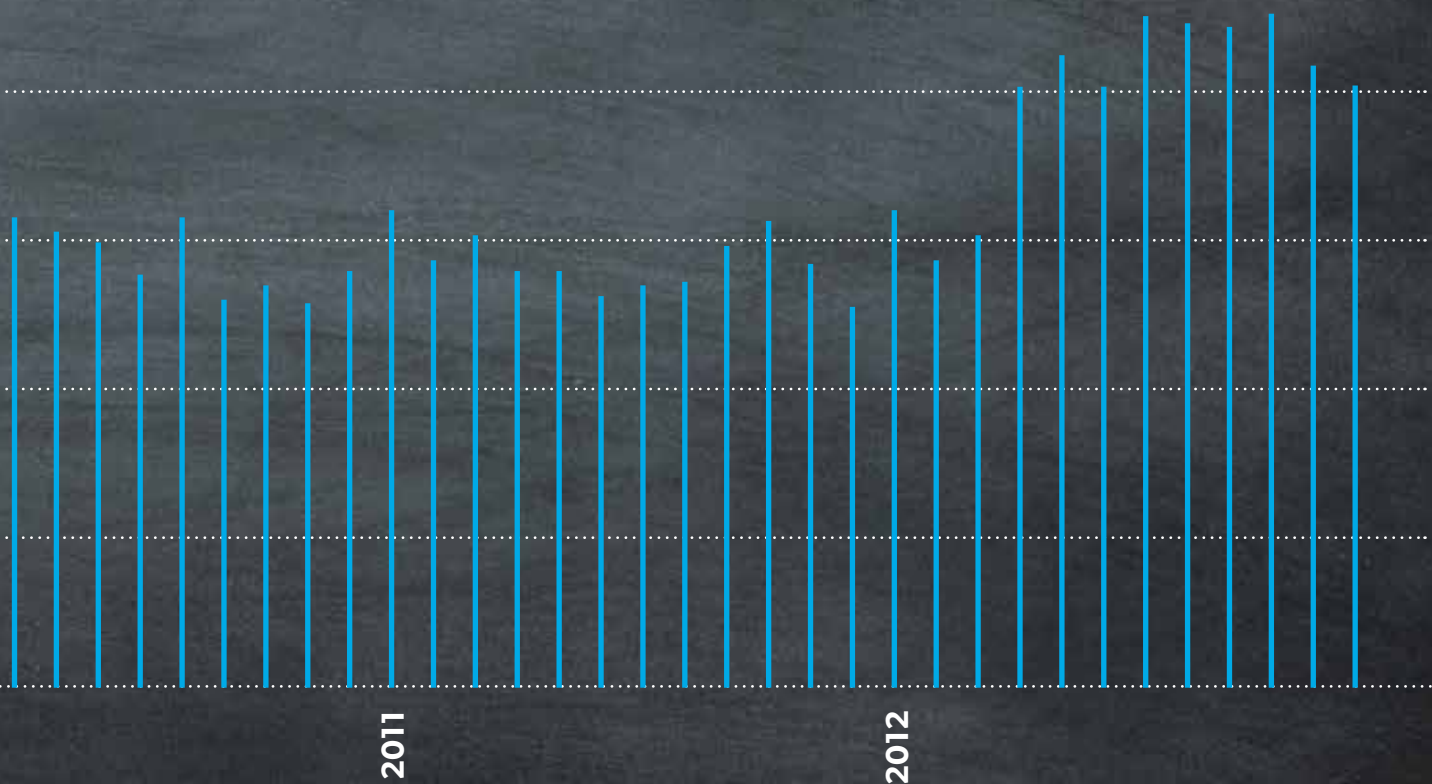
Unique User Trend 2008 – 2012



Monthly Unique Users 2008 – 2012

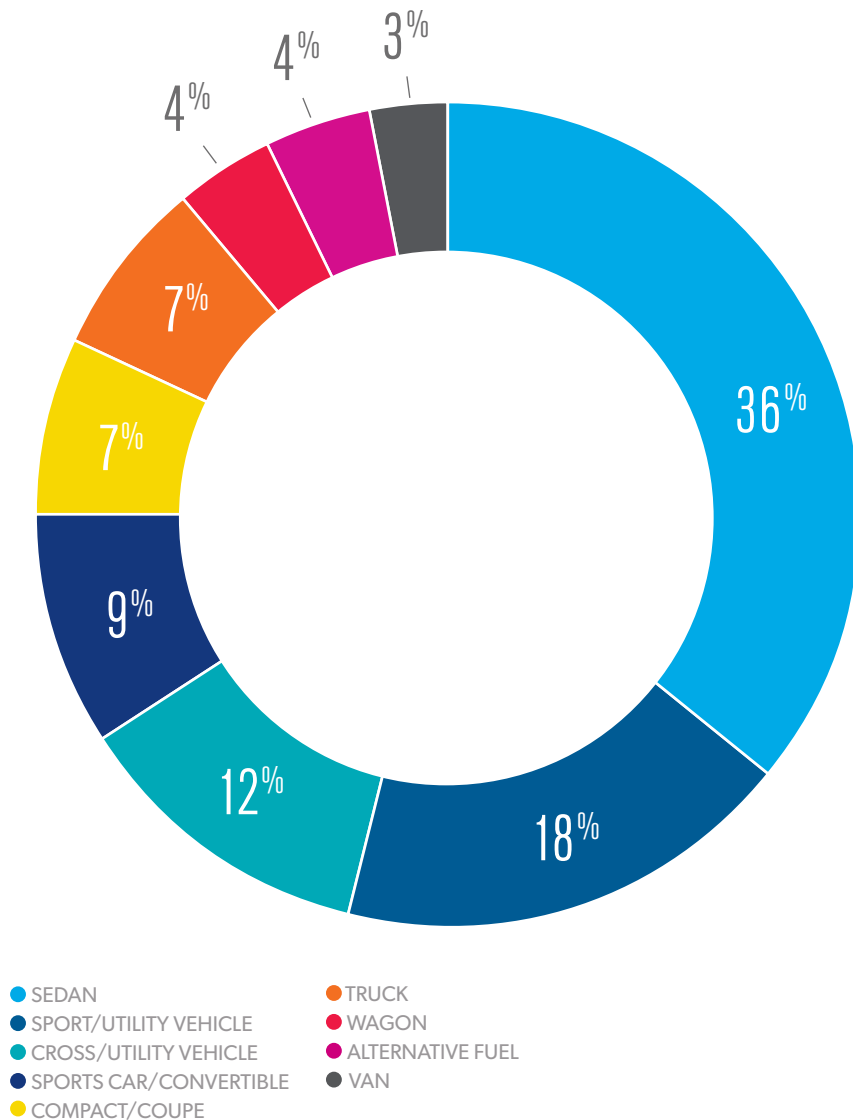


Our average, monthly audience grew by 37 percent, 2011 – 2012, which is the largest year-over-year increase within the past four years



Top Body Styles, Brands and Vehicles of 2012

2012 Share of Shopping by Vehicle Category



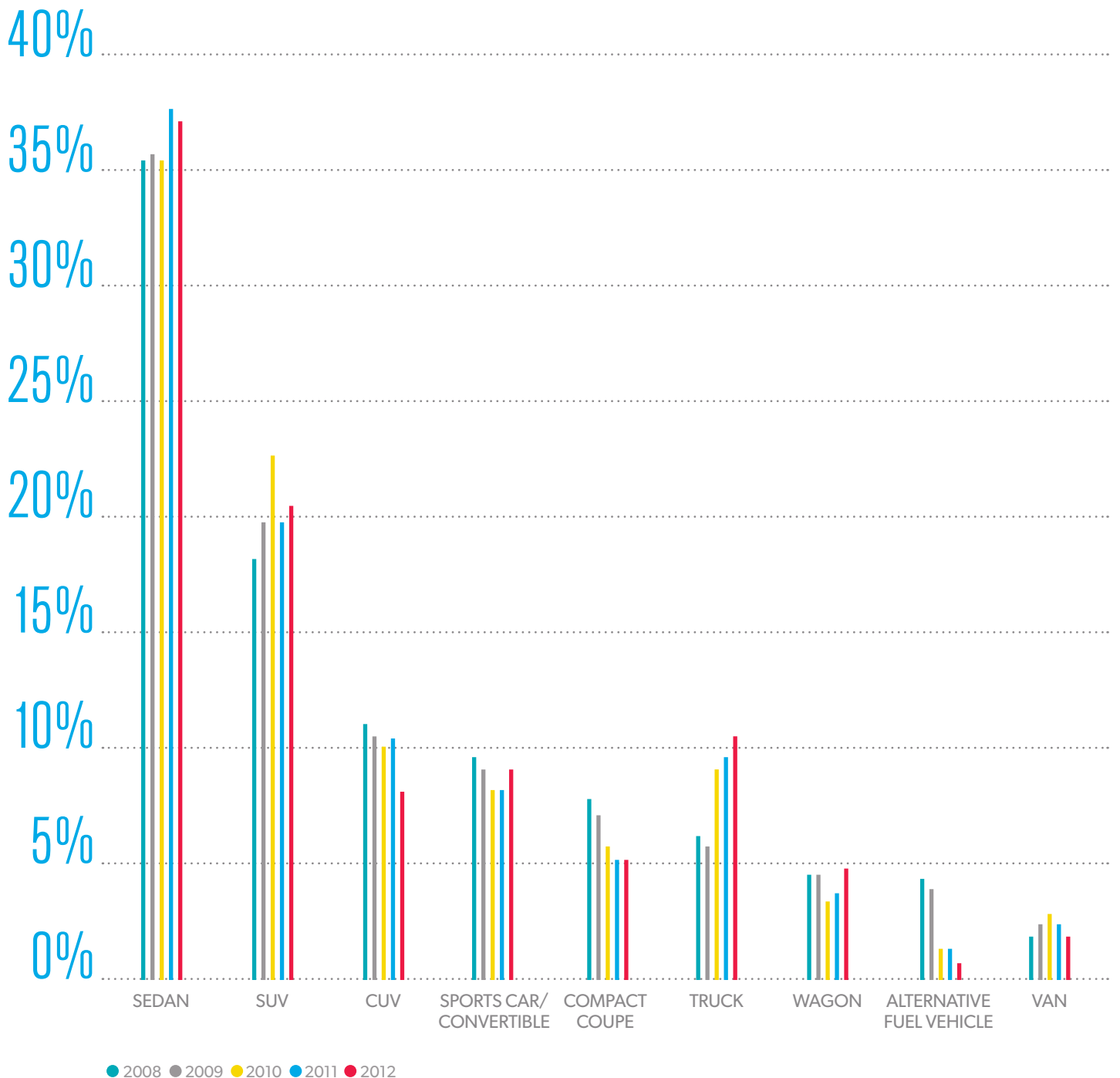
⇒ SUV shopper volume, for both standard and luxury models, decreased nearly 10 percent in 2012—the second consecutive year of decline and the lowest volume over the last five years

⇒ The Compact /Coupe segment saw an increase of nine percent in 2012—its fourth consecutive year of growth. Full credit goes to the Coupe and Luxury Coupe segments, as Compact traffic decreased in 2012

⇒ The Alternative Fuel segment saw a 6.6 percent increase in shopper volume in 2012. Hybrid and Electric Vehicle traffic grew while the Diesel segment shrunk

⇒ After seeing decreases in shopper volume every year since 2009, the Truck segment saw an increase of 6.1 percent in 2012. This increase comes entirely from the Large Truck segment, as share of Small Trucks actually declined

Share of Shopping by Vehicle Category 2008 – 2012



Share of Shoppers by Brand 2009 – 2012

BRAND	2009	2010	2011	2012	% VARIANCE 2011-2012
Ford	12.5%	12.0%	13.9%	14.0%	1%
Chevrolet	10.8%	10.8%	10.5%	9.5%	-10%
Toyota	11.3%	11.0%	10.1%	9.1%	-9%
Honda	8.4%	7.9%	8.4%	7.4%	-12%
Nissan	6.4%	6.6%	5.5%	6.1%	11%
Audi	3.1%	3.1%	4.0%	4.7%	18%
Hyundai	3.1%	4.1%	5.0%	4.3%	-15%
Dodge	3.4%	4.1%	3.7%	3.7%	0%
BMW	3.2%	3.0%	2.8%	3.1%	11%
Kia	2.0%	2.5%	3.2%	3.1%	-2%
Volkswagen	3.4%	2.9%	3.2%	3.1%	-3%
Jeep	2.3%	3.1%	2.6%	2.8%	8%
Mazda	2.5%	2.6%	2.7%	2.8%	1%
Subaru	2.0%	2.2%	2.1%	2.4%	15%
Mercedes-Benz	3.9%	1.4%	1.7%	2.1%	23%
Acura	2.3%	2.1%	2.1%	1.9%	-9%
Lexus	1.5%	1.7%	1.8%	1.9%	3%
Cadillac	2.0%	1.5%	1.4%	1.8%	24%
GMC	2.3%	3.0%	1.7%	1.8%	3%
Porsche	1.0%	1.1%	1.2%	1.5%	21%
Mitsubishi	1.8%	1.8%	1.5%	1.3%	-14%
Volvo	1.5%	1.6%	1.3%	1.3%	-5%
Buick	0.8%	1.1%	1.2%	1.2%	-3%
Infiniti	0.8%	1.0%	1.1%	1.1%	-1%
Chrysler	1.7%	1.7%	1.2%	1.1%	-8%
Fisker	0.0%	0.0%	0.00%	1.0%	0%

BRAND	2009	2010	2011	2012	% VARIANCE 2011-2012
Lincoln	0.8%	0.9%	0.8%	0.9%	9%
Mini	0.4%	0.5%	0.9%	0.8%	-8%
Scion	0.5%	0.6%	0.5%	0.5%	1%
Fiat	0.0%	0.0%	0.4%	0.5%	35%
Jaguar	0.4%	0.3%	0.5%	0.5%	0%
Ram	0.4%	0.8%	0.4%	0.4%	9%
Suzuki	0.4%	0.6%	0.6%	0.4%	-30%
Land Rover	0.3%	0.3%	0.4%	0.3%	-10%
Saab	0.3%	0.3%	0.2%	0.1%	-47%
Smart	0.1%	0.0%	0.1%	0.1%	5%
Tesla	0.0%	0.0%	0.0%	0.1%	0%

⇒ Notable Brands

Ford remained at the top spot—its third consecutive year there—closing 2012 with 14 percent share of Jumpstart shoppers.

Chevrolet and Toyota clinched the second and third spots respectively, despite both brands experiencing decreases of more than nine percent from 2011.

Honda had the fourth largest share of shoppers in 2012, but saw a significant decrease of 12 percent, 2011 – 2012.

Nissan rounded out the top five after seeing an 11 percent year-over-year increase, widening the gap between Hyundai, which decreased 15 percent in 2012 after growth, 2008 – 2011.

⇒ Highest Growth

At 35 percent growth, Fiat increased the most in variance in 2012. While not gaining major ground in share-point increases, its variance growth was notable for a brand with one vehicle in the U.S. market.

With a one percentage point increase over 2011, Fisker grew the most in share-points in 2012. It was one of six Luxury brands in the top 10 in share point growth along with Audi, Mercedes-Benz, Cadillac, BMW and Porsche.

⇒ Largest Decrease

With Saab leaving the U.S. market in 2011, it garnered the largest variance decrease (47 percent) in early 2012, as U.S. operations wound down and as final assets were sold.

Honda saw the greatest loss in share-point, dropping a full percentage point compared to 2011. Other brands with notable declines included Chevrolet, Toyota, Hyundai and Mitsubishi.

The Top 10 Vehicles Shopped on Jumpstart Sites 2009 – 2012

2009 TOP MODELS	2010 TOP MODELS	2011 TOP MODELS	2012 TOP MODELS
#1 Honda Accord 2.29%	#1 Honda Accord 2.03%	#1 Ford Mustang 2.59%	#1 Ford Mustang 2.81%
#2 Honda Civic 2.21%	#2 Honda Civic 1.97%	#2 Honda Civic 2.05%	#2 Honda Accord 1.99%
#3 Ford Mustang 2.12%	#3 Ford Mustang 1.94%	#3 Honda Accord 1.92%	#3 Ford Escape 1.69%
#4 Ford F-150 2.04%	#4 Ford F-150 1.72%	#4 Ford Focus 1.71%	#4 Ford Focus 1.65%
#5 Chevrolet Impala 1.96%	#5 Toyota Camry 1.70%	#5 Ford Escape 1.61%	#5 Chevrolet Corvette 1.64%
#6 Toyota Camry 1.87%	#6 Chevrolet Impala 1.63%	#6 Ford Explorer 1.61%	#6 Honda Civic 1.58%
#7 Chevrolet Silverado 1.66%	#7 Chevrolet Silverado 1.39%	#7 Toyota Camry 1.58%	#7 Ford F-150 1.54%
#8 BMW 3-Series 1.43%	#8 Nissan Altima 1.36%	#8 Chevrolet Impala 1.52%	#8 Toyota Camry 1.50%
#9 Nissan Altima 1.42%	#9 Toyota Corolla 1.29%	#9 Toyota Prius 1.48%	#9 Ford Fusion 1.37%
#10 Toyota Corolla 1.41%	#10 Ford Explorer 1.28%	#10 Ford F-150 1.33%	#10 Nissan Altima 1.33%

For the second consecutive year, Ford occupied five of the top 10 spots in the overall top models list in 2012—with Mustang holding the top Ford spot during that same timeframe

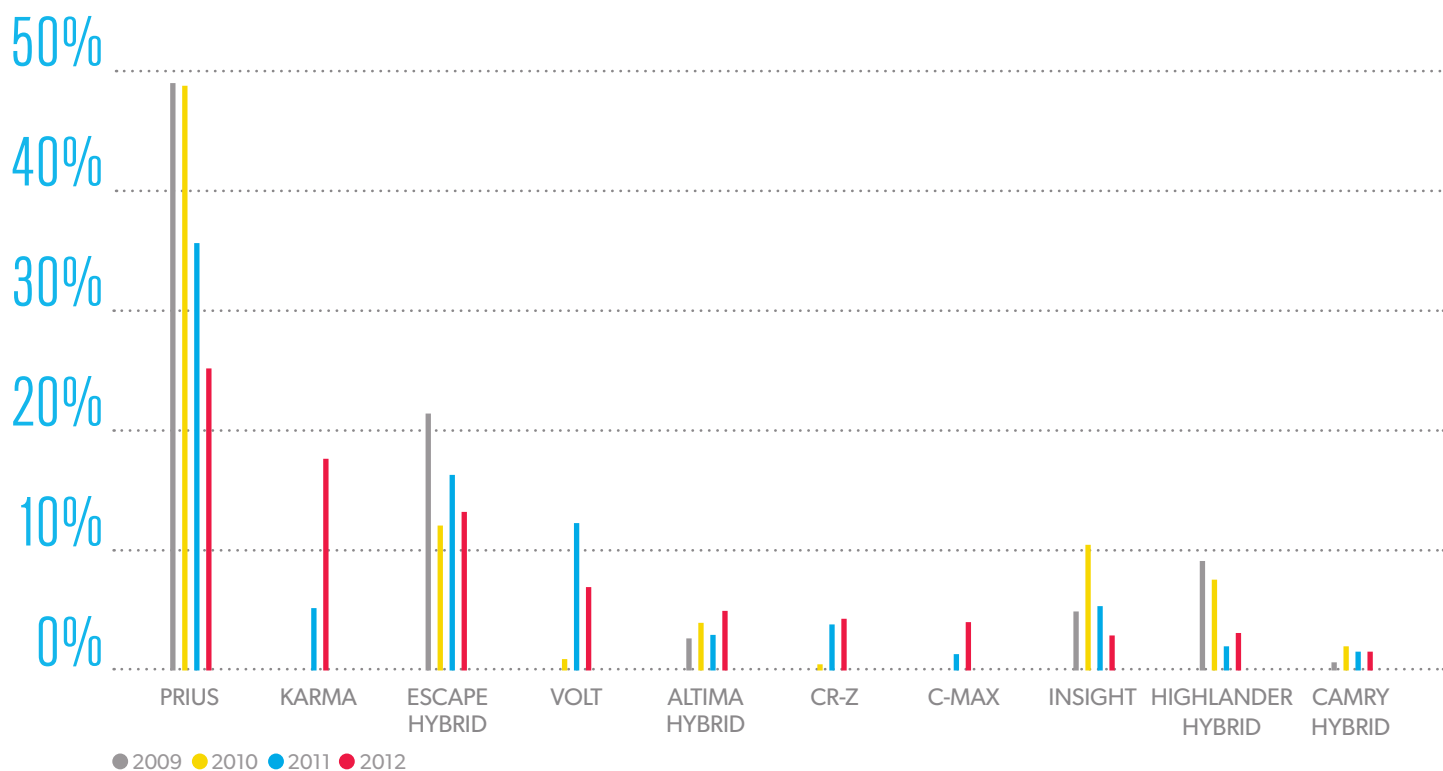
In 2012, Ford Focus, Escape, and F-150 remained among top contenders, however Ford Fusion bumped Ford Explorer out of the top 10 list

Chevrolet Corvette and Nissan Altima were new to the Jumpstart's top 10 vehicle list in 2012, replacing the Toyota Prius (new to the top 10 in 2011) and Chevrolet Impala (a top 10 vehicle since 2009)

% notes a yearly average

Top Vehicles by Category on Jumpstart Sites in 2012

Alternative Fuel Vehicles



Vehicles that saw significant increases and decreases in share of shoppers in 2012

-31%

Even though it still represented the largest share of this segment in 2012, Toyota Prius declined in share vs. 2011

+177%

Fisker Karma's segment share increased by 177 percent, moving it up two spots on the top 10 alternative fuel vehicles list

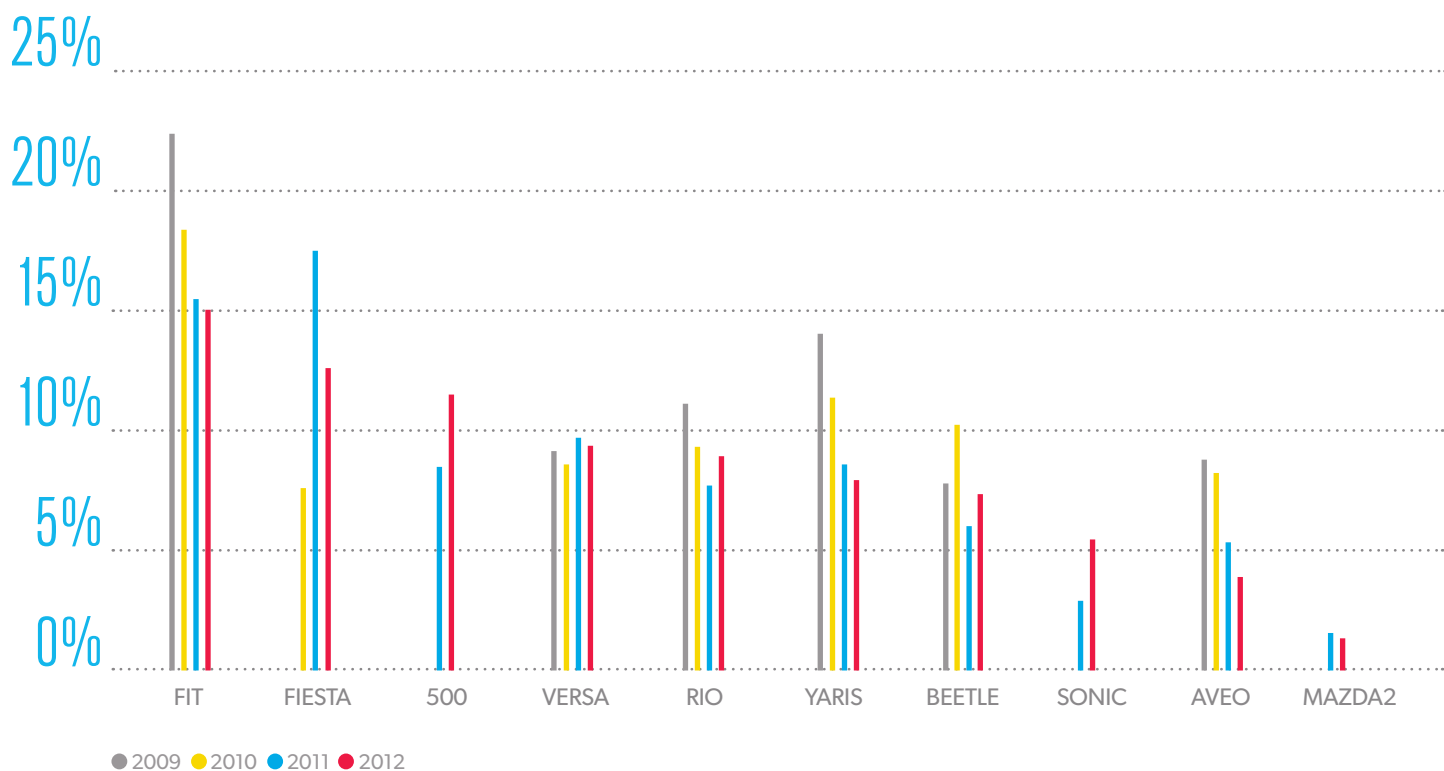
-43%

On the heels of significant growth in 2011, share of Chevrolet Volt shoppers dropped the most in this segment in 2012

+239%

Ford C-Max saw an increase of 239 percent at the introduction of online vehicle model pages near year's end

Compact Vehicles



Vehicles that saw significant increases and decreases in share of shoppers in 2012

-4%

Honda Fit's share of shoppers decreased in 2012 compared to the year prior, yet it still represented the largest share of this segment

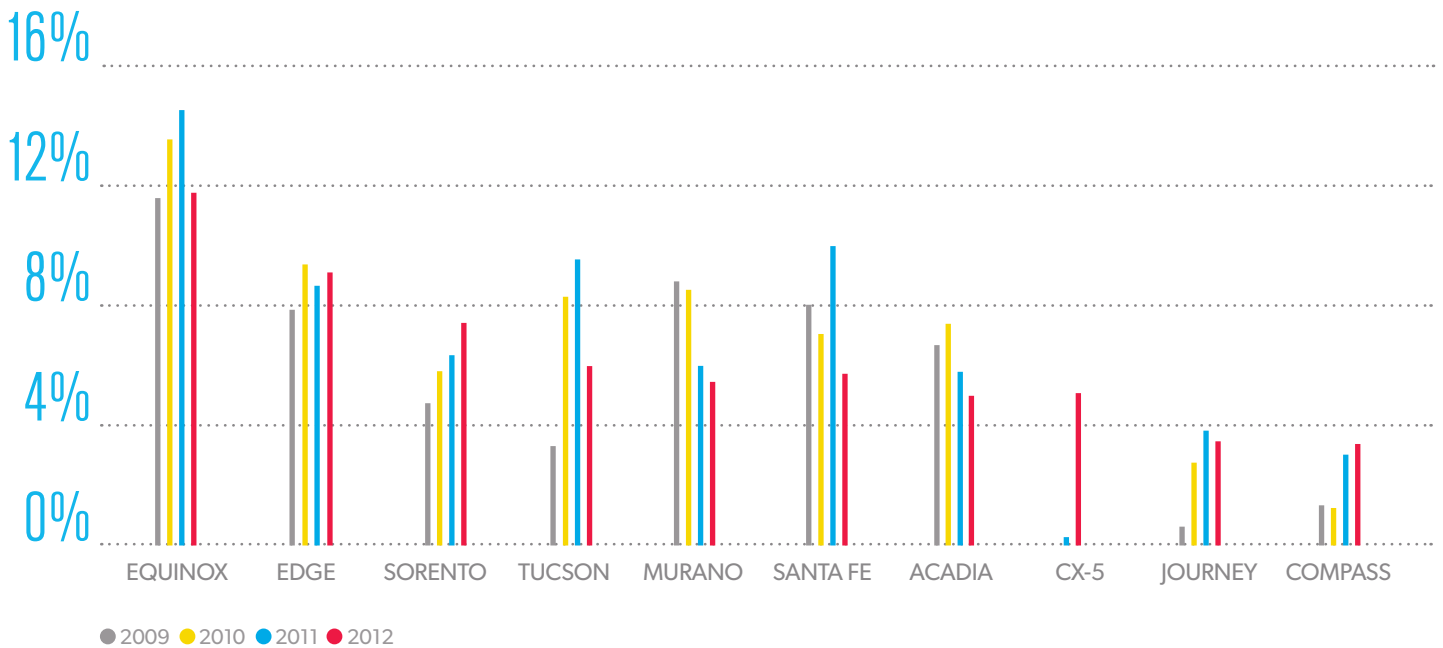
-26%

After holding nearly 18 percent share in 2011, Ford Fiesta fell to 13 percent share of Compact shoppers in 2012

+27-55%

Chevrolet Sonic, Fiat 500, and the Kia Rio all saw significant year-over-year increases in 2012

Crossover Utility Vehicles



Vehicles that saw significant increases and decreases in share of shoppers in 2012

-17%

In 2012, Chevrolet Equinox captured the largest share of the CUV segment for the fourth consecutive year, despite a decrease in share over 2011

+4%

Ford Edge moved up in CUV shopper share and gained two spots in the top 10 CUVs

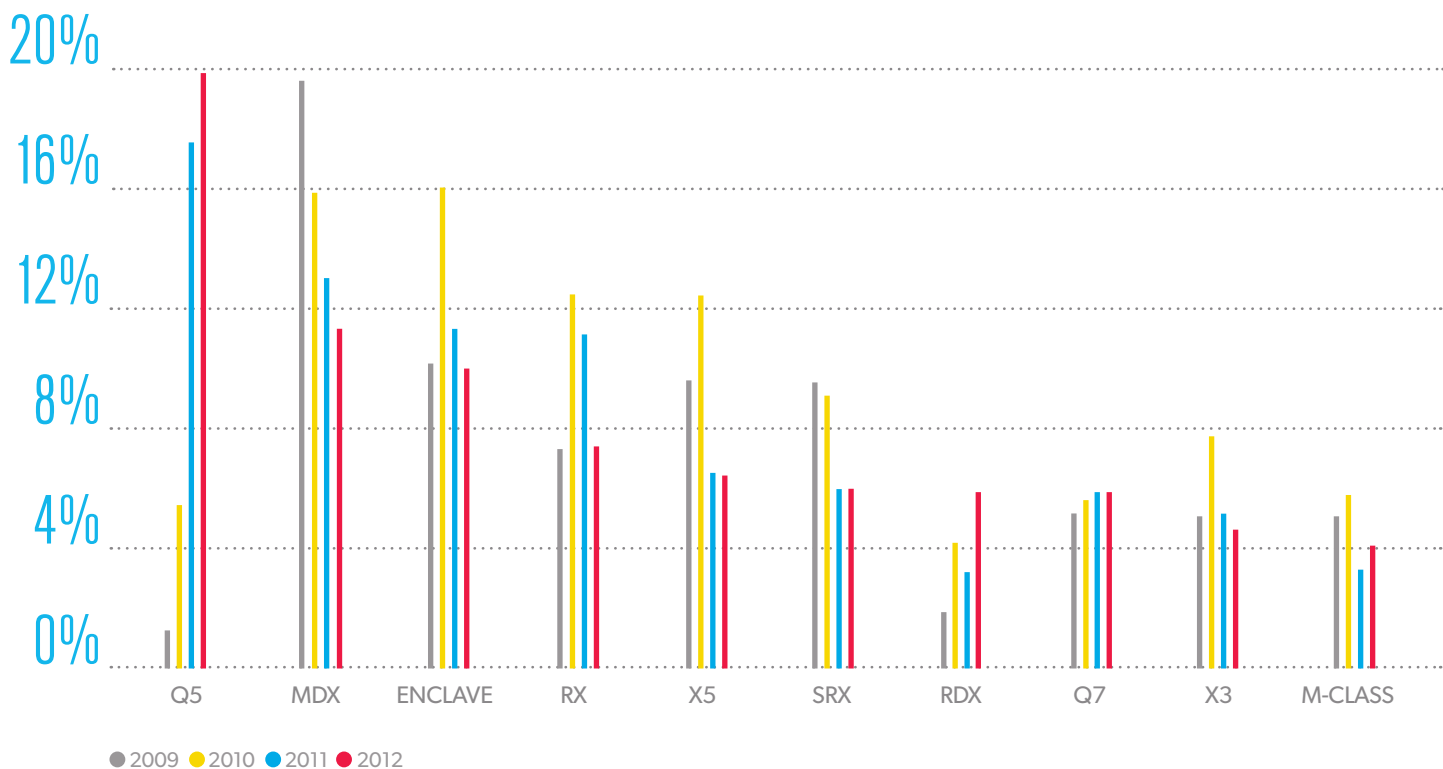
-34%

Hyundai Tucson saw a decrease in share of CUV shoppers and dropped two spots compared to 2011

-40%

Hyundai Santa Fe saw the largest decrease in share of CUV shoppers in 2012 among the top 10

Luxury Crossover Utility Vehicles



Luxury CUVs represented 38 percent of all CUV shopping in 2012

Vehicles that saw significant increases and decreases in share of shoppers in 2012

-9%

Acura MDX saw a nine percent decrease in share of luxury CUV shoppers in 2012

+15%

Audi Q5 increased 15 percent and held the highest share of luxury CUV shoppers in 2012

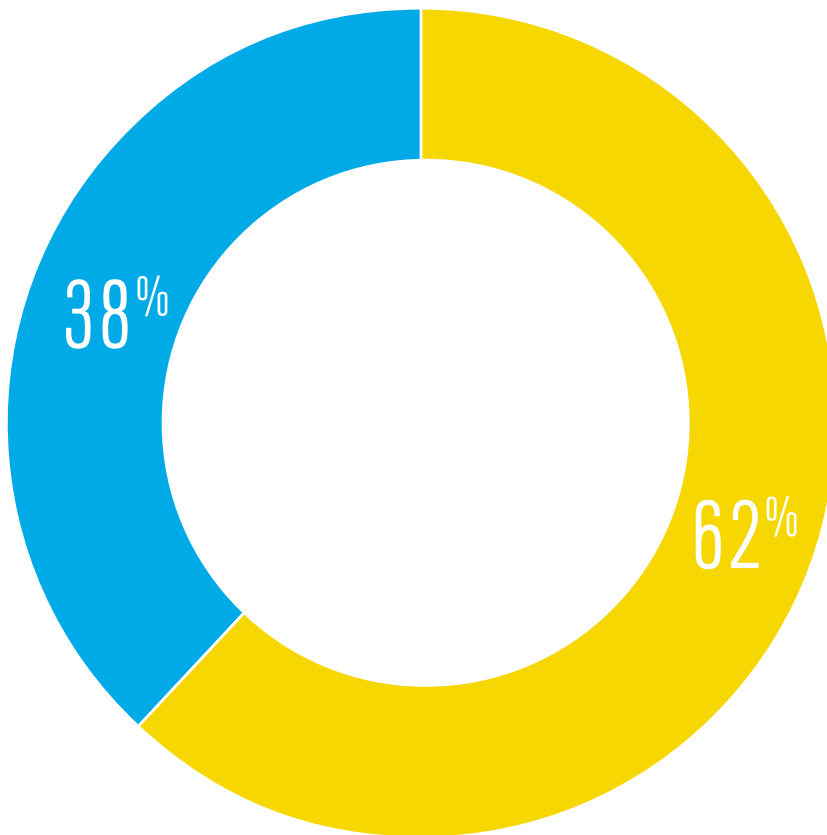
+68%

Acura RDX was new to the top 10 luxury CUV list with the largest increase of 68 percent in share from 2011 to 2012

-13%

Buick Enclave saw a decrease of 13 percent in 2012, its second consecutive year of decline

CUVs: Standard vs. Luxury Shoppers



In the CUV segment, the percentage share of luxury CUV shoppers has increased from 36 percent in 2011 to 38 percent in 2012, which is a 6.6 percent increase

Segment Share of CUVs

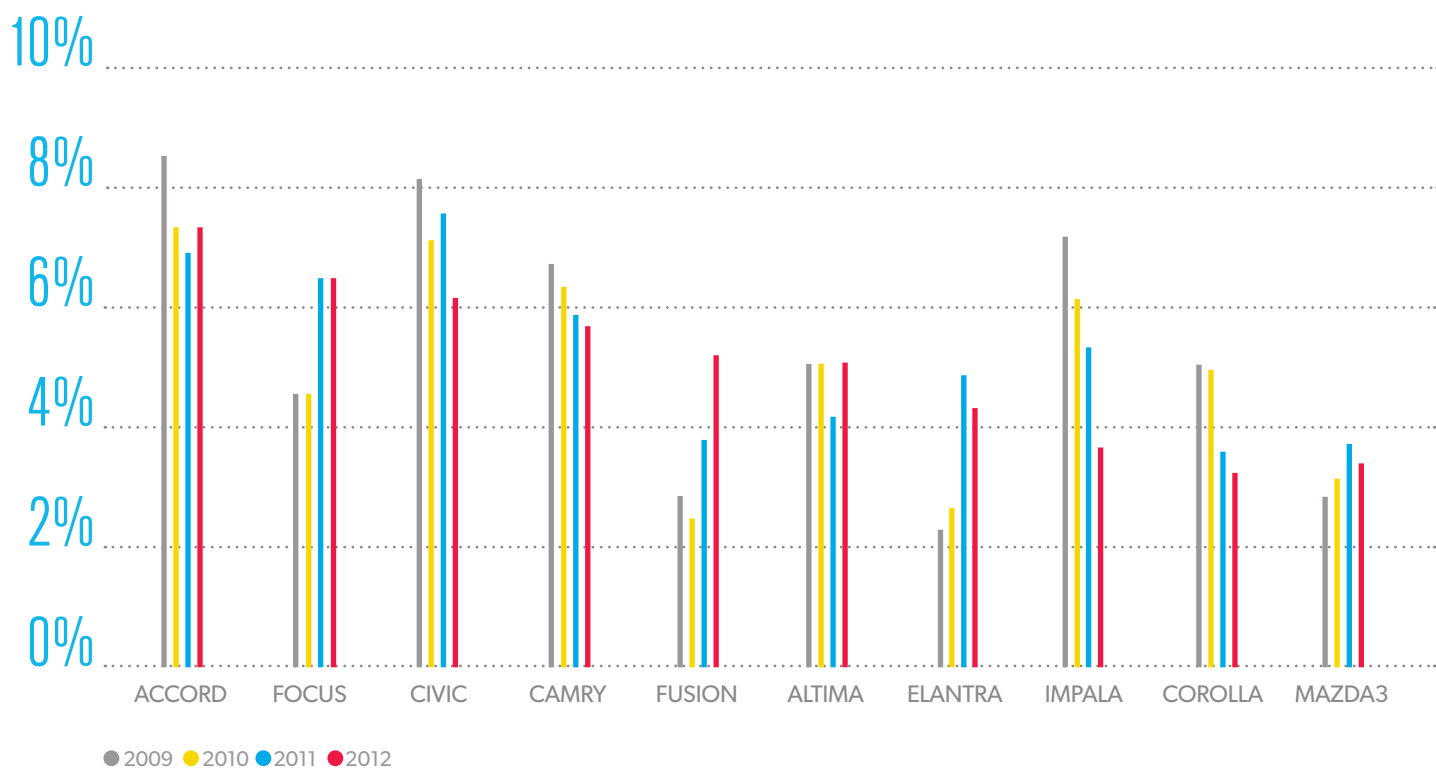
Standard	Luxury	
64%	36%	— 2011
62%	38%	— 2012

Unique User Traffic

Standard	Luxury	
9M	5M	— 2011
12M	8M	— 2012

● STANDARD CUV
● LUXURY CUV

Sedans



Vehicles that saw significant increases and decreases in share of shoppers in 2012

+6%

Honda Accord led the Sedan category and has remained in the top three for four consecutive years

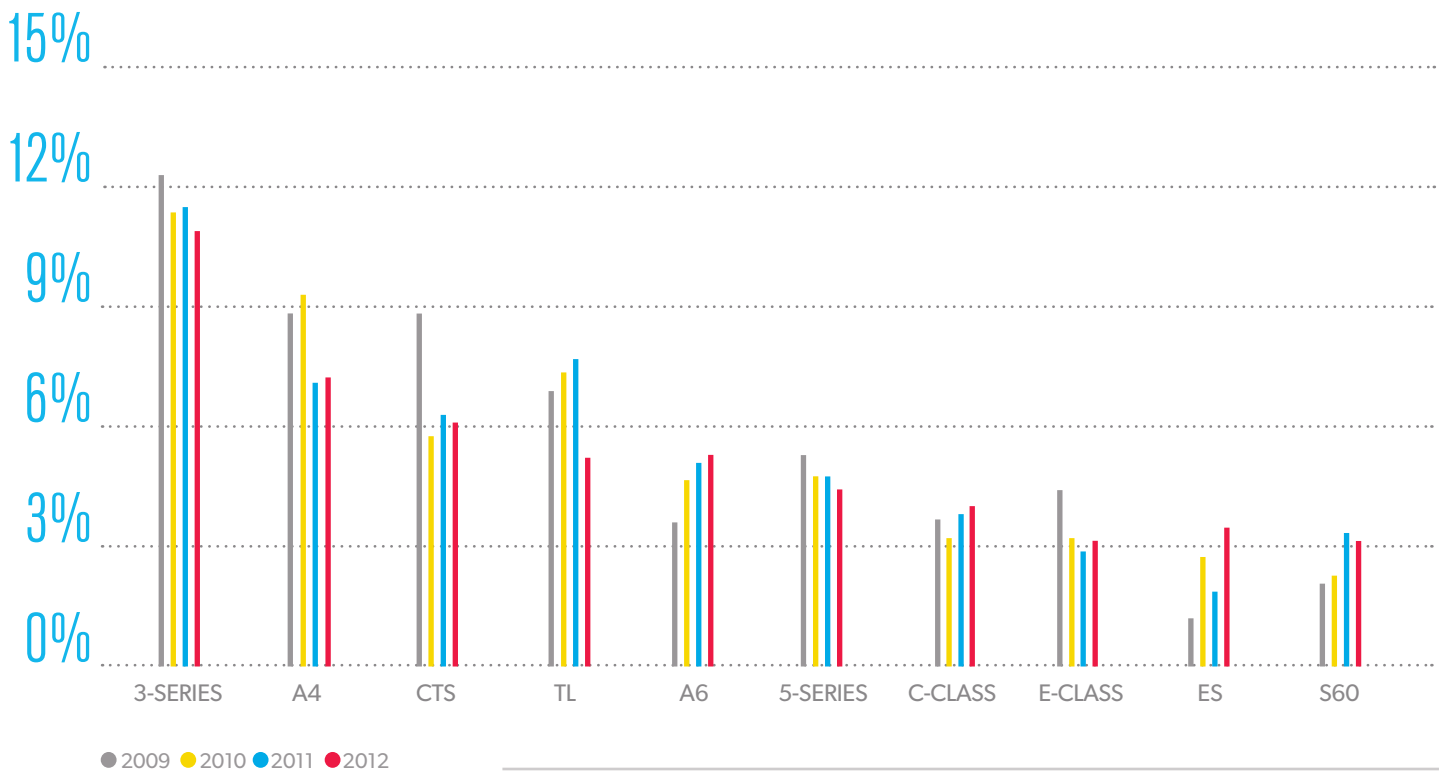
-3%

Toyota Camry held the fourth position in 2012 despite dropping in share for the fourth consecutive year

+36%

Ford Fusion jumped significantly in share of Sedans from 2011 to 2012 marking its second consecutive year of growth over 30 percent

Luxury Sedans



Vehicles that saw significant increases and decreases in share of shoppers in 2012

+3%

Audi A4 increased three percent in share in 2012 and held second position in the top 10 luxury Sedans

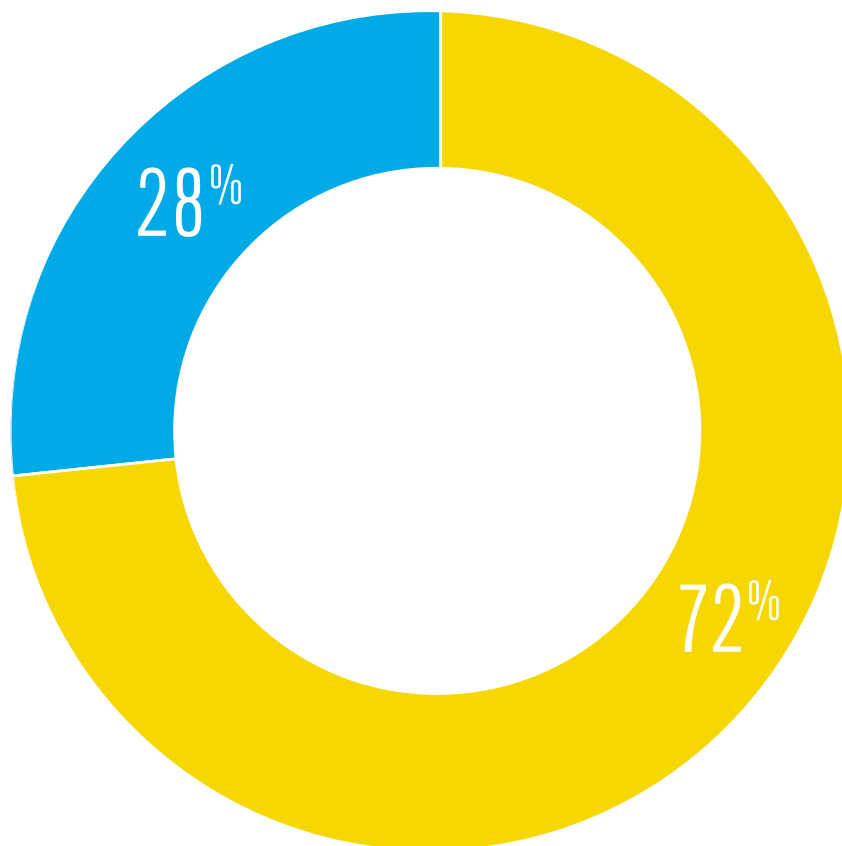
-4%

Cadillac CTS regained its position in third despite seeing a four percent decline in 2012

+5%

Audi A6 was the only model in the top 10 to increase its share of luxury Sedans for three consecutive years

Sedans: Standard vs. Luxury Shoppers



Share of Luxury Sedan shoppers grew from 26.6 percent in 2011 to 27.9 percent in 2012—a 4.8 percent increase

This subcategory is expected to grow again in 2013 due to a number of vehicle launches in the entry luxury price range as well as significant model refreshes in the mid to full-size luxury sedan body style

Segment Share of Sedans

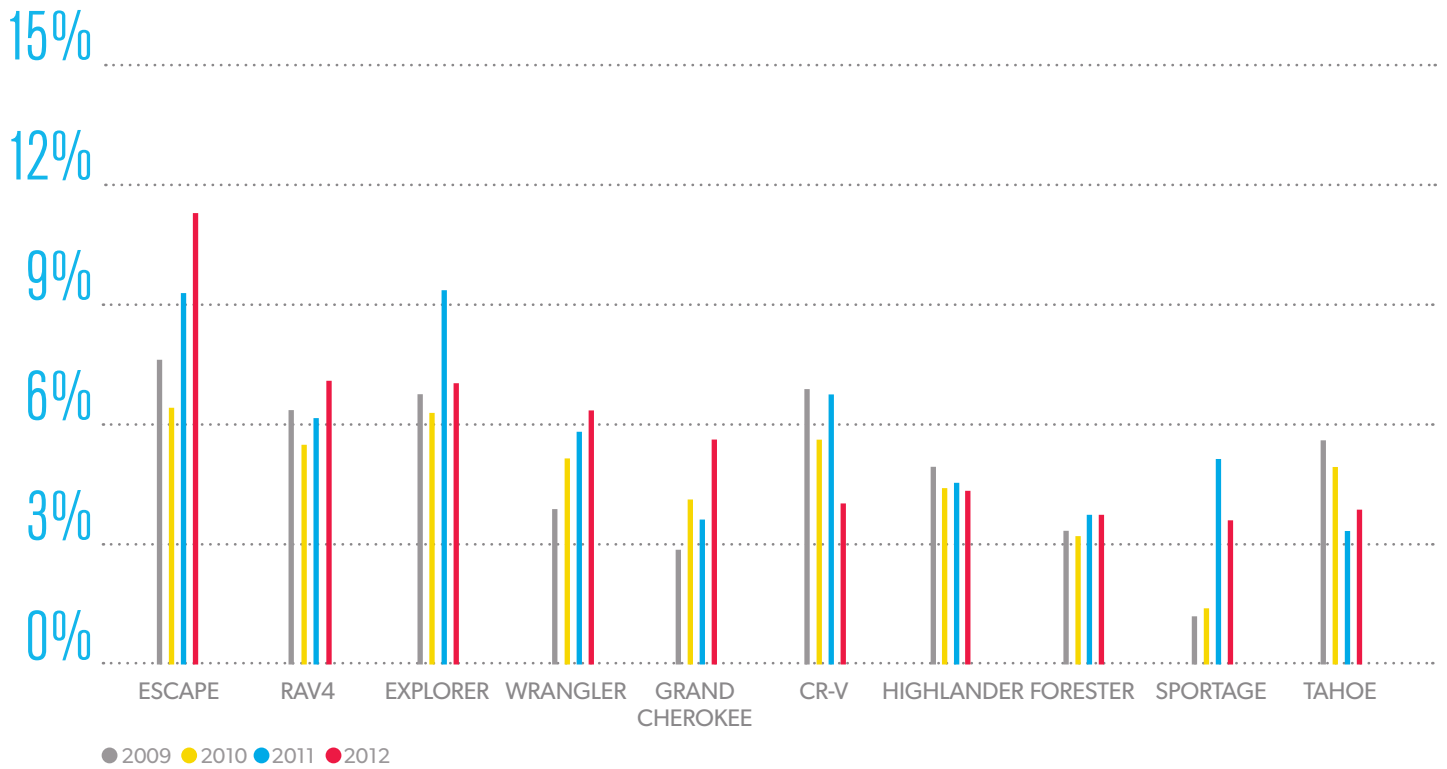
Standard	Luxury	
73%	27%	— 2011
72%	28%	— 2012

Unique User Traffic

Standard	Luxury	
32M	12M	— 2011
43M	17M	— 2012

● STANDARD SEDAN
● LUXURY SEDAN

Sport Utility Vehicles



Vehicles that saw significant increases and decreases in share of shoppers in 2012

+16%

Ford Escape's share of SUV shopping increased 16 percent in 2012

+16%

Chevrolet Tahoe is new to the top 10 after seeing a 16 percent increase in 2012, replacing the Honda Pilot

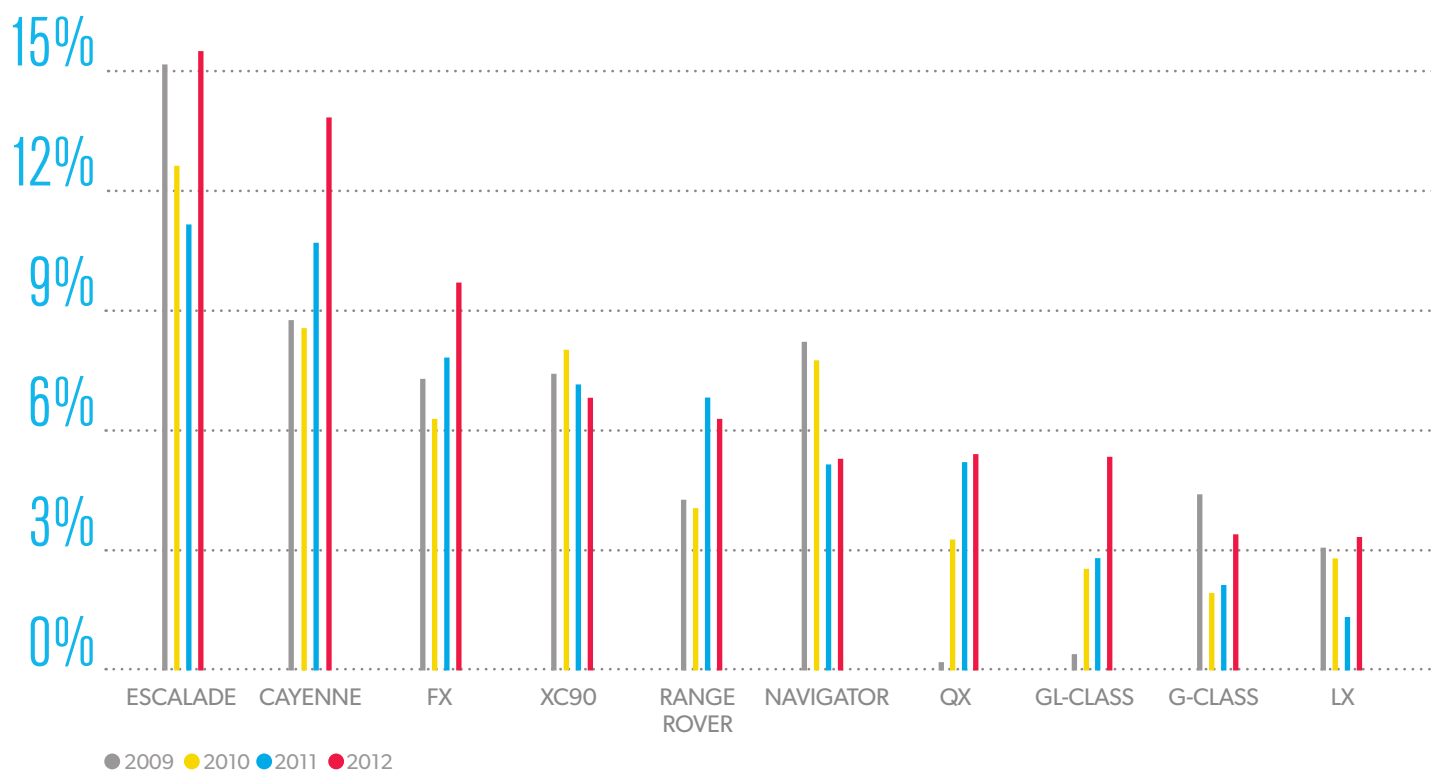
-35%

Honda CR-V saw the largest decrease among the top 10 in the segment at 35 percent, dropping three spots on the list

-23%

Ford Explorer dropped one spot on the list with a decrease of 23 percent from 2011 to 2012

Luxury SUVs



Vehicles that saw significant increases and decreases in share of shoppers in 2012

+40%

Cadillac Escalade increased its share of the luxury SUV segment by 40 percent from 2011 to 2012

+22–27%

Porsche Cayenne and Infiniti FX also increased their share of luxury SUV shoppers significantly in 2012

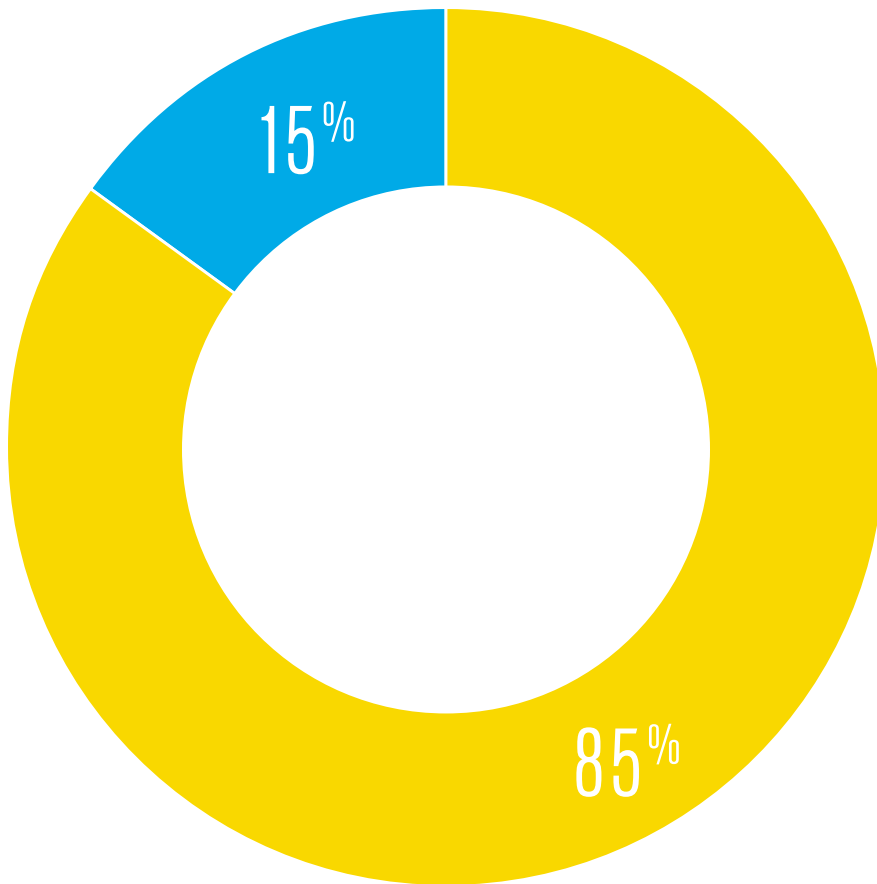
-11%

Among the top 10 luxury SUVs, Land Rover Range Rover saw the largest decrease from 2011 to 2012

+74%

Mercedes-Benz GL-Class was new to the top 10 luxury SUV list in 2012 with an increase of 74 percent from 2011

SUVs: Standard vs. Luxury Shoppers



In the SUV segment, the percentage share of Luxury SUV shoppers has increased by 0.2 percent from 2011 to 2012. This is a smaller increase in Luxury shoppers than we have seen in both the Sedan and CUV segments.

Segment Share of SUVs

Standard	Luxury	
85%	15%	— 2011
85%	15%	— 2012

Unique User Traffic

Standard	Luxury	
20M	4M	— 2011
25M	5M	— 2012

- STANDARD SUV
- LUXURY SUV



INS

**INSIGHTS
& ADVICE**

Case Studies
and Best Practices

Super Bowl Spots: Expensive or Effective?

Jumpstart Automotive Group performed its third annual Super Bowl study measuring the impact of the big game spot on overall share of shoppers

The Super Bowl has long been known as the ultimate competitive match, but over time it has evolved from being just a football game to a showdown of the best advertising ideas, biggest stunts and major celebrity endorsements.

2012's Super Bowl XLVI saw the greatest turnout of automotive advertisers since the financial dip in 2008 and 2009. With 20 in-game spots and a total of nearly 21 minutes of advertising, the auto industry brought humor, drama and entertainment to the game like never before.

In the weeks leading up to the game, many advertisers made a bold move from previous years by leaking teasers online; some even released full-length and extended versions of their spots. Viewers and the media spread the word about their favorite—or most noteworthy—ads. Only a handful of advertisers refrained from posting teasers online prior to the game in hopes of building anticipation for the in-game spot.

Super Bowl viewership was up slightly from last year. Nielsen Co. reported an estimated 111.3 million people watched the Giants-Patriots game in full, compared to the estimated 111 million reported for the 2011 game. Combine that viewership with the amount of ad previews and post-game views from online video (some advertisers had already recorded nearly 17 million views on YouTube alone on the Monday following the game), proving the annual mass media event sustained extensive reach, pulled consumers in and engaged them directly with the advertisers.

This alignment carried a hefty price tag, and it's critical for advertisers to measure the true return on investment (ROI). Jumpstart Automotive Group performed its third annual Super Bowl study, measuring the impact of the big game spot on overall share of shoppers. The study examined immediate results in the days following the game, as well as three weeks post-game, which provided insight into which advertisers had a lasting impact and the estimated price per share of shopper gained. This study provided a different look at ROI by utilizing third-party automotive website shopper data to gauge how ads

resonated with consumers, and if the ads brought on initial and lasting consideration of the vehicles that were advertised in the game.

Immediate Results Following Super Bowl

The immediate analysis looked at online traffic data from the period during the game and the day following (Sunday through Monday) compared to the same time frame a week prior across Jumpstart's portfolio of automotive websites. The evaluation consisted of measuring the advertisers' share of brand and vehicle model page traffic for auto manufacturers that purchased in-game spots.

ADVERTISER	SUPER BOWL SUNDAY VS. PRIOR SUNDAY	SUPER BOWL MONDAY VS. PRIOR MONDAY	SUNDAY THRU MONDAY 2/5-2/6 VS. 1/29-1/30
ACURA NSX	78%	690%	479%
FIAT 500	71%	384%	249%
CHEVROLET SONIC	47%	273%	182%
HYUNDAI VELOSTER	30%	23%	26%
VOLKSWAGEN BEETLE	30%	6%	13%

Acura's humorous spot featuring Jerry Seinfeld and Jay Leno, the two battling over who would own the first NSX, resonated with consumers and spiked interest in the vehicle, which was not available at the time. As of February 7th, 2012 YouTube viewing counts of the Acura NSX spot had garnered the highest views of all automotive spots that year at nearly 16.5 million views.

These five vehicles had the biggest gain in online car shoppers Super Bowl week compared to the prior week

Acura's humorous spot featuring Jerry Seinfeld and Jay Leno resonated with consumers and spiked interest in a vehicle that was not yet available

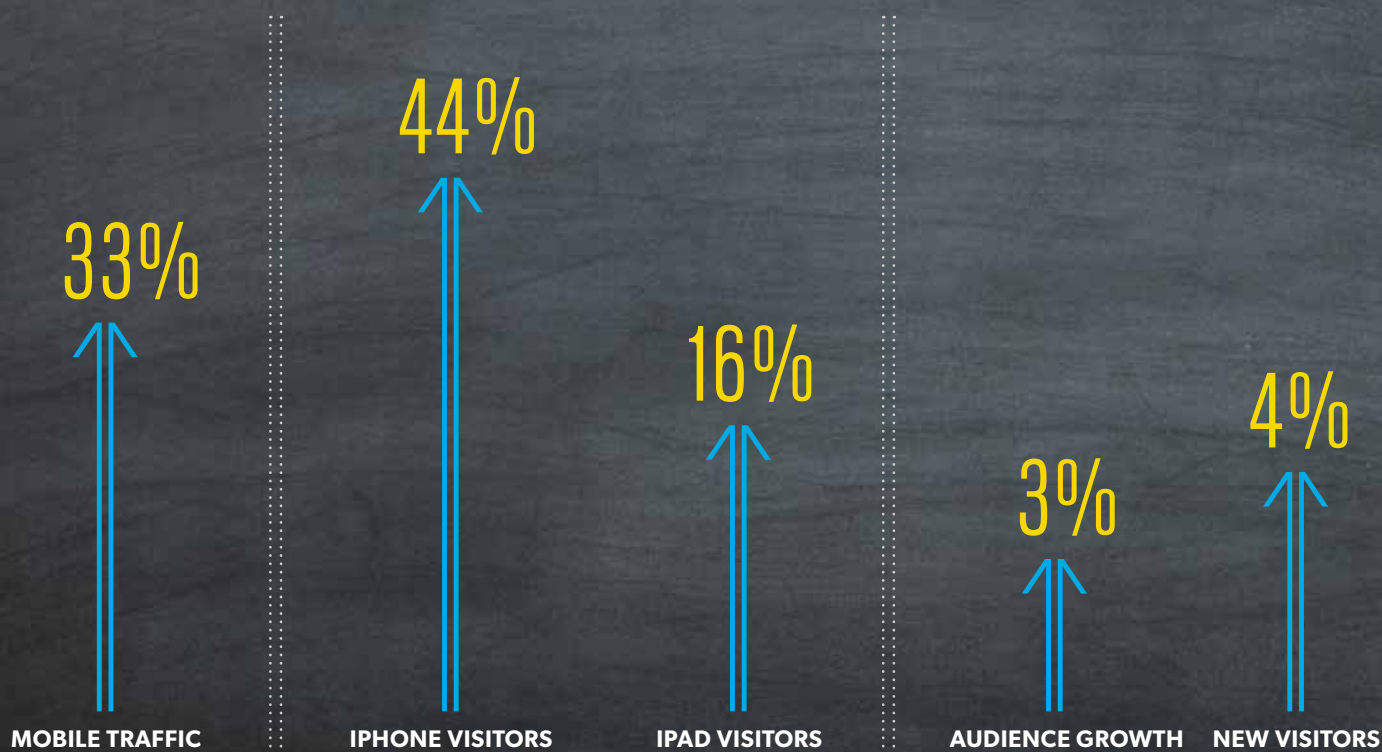


source: youtube.com

The Fiat 500 and the Chevrolet Sonic also experienced noteworthy gains in share, with nearly 250 percent and 182 percent growth over the same period. After the top three vehicles in share growth, the gap widens significantly with the Hyundai Veloster and the Volkswagen Beetle coming in fourth and fifth. Although there was a combined Sunday through Monday growth of 26 and 13 percent, respectively, they didn't spark the same high volume impact of the top three advertisers.

Those that did not see an immediate return on their Super Bowl investment are the Chevrolet Camaro, with the highest drop in traffic share (down 56 percent), the Hyundai Elantra (down nine percent) and the Lexus GS (down eight percent). Despite not seeing immediate shopper gains from the Super Bowl, the Elantra does not lack automotive shopper interest. In January 2012, Elantra was awarded the 2012 North American Car of the Year at the Detroit Auto Show and has jumped to the 10th spot in the top 10 car sales in the U.S.

Jumpstart Traffic Super Bowl Sunday vs. the Sunday Prior



ROI Analysis Measuring Lasting Impact in Share Growth and Cost per Share Gained

Jumpstart's extended ROI analysis took the same approach in examining model-specific growth in share among car shoppers across Jumpstart sites. In addition to evaluating the share growth, Jumpstart calculated the estimated price each manufacturer paid for every percent in share gained. The analysis was based on average assumed total ad dollars spent by each of the advertisers during the Super Bowl.

The timeframe of the analysis extended over a six-week period beginning three weeks prior to the Super Bowl to establish benchmark metrics for the OEMs slated to run spots during the game, and then extended three weeks post-Super Bowl to better understand the enduring effects of the large Super Bowl investments. The chart on the following page presents the results of the analysis in total media spend, share of shopper growth over the study period, and the estimated price per share of shoppers gained.

Growth in Share of Shoppers

When looking at the highest growth in share of automotive shoppers from pre-Super Bowl vs. post-Super Bowl, the Fiat 500 Abarth, Chevrolet Sonic and Lexus GS were the clear winners, coming in at 87, 86 and 84 percent growth, respectively. This growth over the extended three-week period is much more conservative compared to prior growth seen immediately following the Super Bowl where brand share had grown up to 479 percent on the Sunday through Monday of the Super Bowl vs. the prior week. The hype around Super Bowl ads tends to die off within two to three weeks following the game, but some advertisers succeed in holding a significant level of growth further out after the initial excitement has worn off.

Highest Media Spend

The highest estimated media spent per share of shoppers gained goes to the Honda CR-V ("Matthew's Day Off" with Matthew Broderick), Chrysler ("Halftime in America" with Clint Eastwood) and Acura NSX ("Transactions" with Jerry Seinfeld and Jay Leno), with total spend ranging from more than \$13 million to nearly \$17 million. The Honda CR-V didn't see any sustained share growth, rather their overall share dropped seven percent. Chrysler saw minimal sustained growth at seven percent, and the Acura NSX was more successful at 36 percent growth in share of shoppers in the three weeks following the Super Bowl.

Average Three-Week Growth in Share of Shoppers by Advertiser and Spot Name

87%

Fiat 500 Abarth "Seduction"

86%

Chevrolet Sonic "Stunt Anthem"

84%

Lexus GS "The Beast"

Highest Media Spend and Gain in Shopper Growth

Chrysler "Halftime in America"

\$14,100 +36%

Acura NSX "Transactions"

\$13,100 +7%

Honda CR-V "Matthew's Day Off"

\$16,900 -7%

Super Bowl Spot ROI and Cost Per Share

ADVERTISER & SPOT NAME	2012 SUPER BOWL ADVERTISING EXPENSE*	AVG 3-WEEK GROWTH IN SHARE OF SHOPPERS	APPROXIMATE PRICE PER% OF SHARE GAINED
Acura NSX "Transactions"	\$13,100,000	36%	\$365,000
Audi "Vampire Party"	\$7,000,000	1%	\$6,900,000
Cadillac ATS "Green Hell"	\$3,600,000	7%	\$528,000
Chevrolet Camaro "Happy Grad"	\$7,000,000	7%	\$990,000
Chevrolet Silverado "2012 Mayan Apocalypse"	\$7,000,000	9%	\$785,000
Chevrolet Sonic "Stunt Anthem"	\$7,000,000	86%	\$82,000
Chrysler "Halftime in America"	\$14,100,000	7%	\$1,900,000
Fiat 500 Abarth "Seduction"	\$7,000,000	87%	\$81,000
Honda CR-V "Matthew's Day Off"	\$16,900,000	-7%	\$18,100,000
Hyundai Elantra "Victory Lap"	\$3,500,000	37%	\$94,000

*The estimated spend was derived from the reported average cost of \$3.5 million per :30 second spot; the estimated price per share of automotive shoppers gained is calculated on Jumpstart audience measures for growth in share of brand shoppers.

ADVERTISER & SPOT NAME	2012 SUPER BOWL ADVERTISING EXPENSE*	AVGE 3-WEEK GROWTH IN SHARE OF SHOPPERS	APPROXIMATE PRICE PER% OF SHARE GAINED
Hyundai Genesis Coupe "Think Fast"	\$3,500,000	12%	\$289,000
Hyundai Genesis R-Spec "Faster Acting"	\$3,500,000	26%	\$135,000
Hyundai Veloster Turbo "Cheetah"	\$3,500,000	0%	\$3,500,000
Hyundai "All for One"	\$7,000,000	10%	\$704,000
Kia Optima "A Dream Car. For Real Life"	\$10,500,000	12%	\$863,000
Lexus GS "The Beast"	\$3,500,000	84%	\$42,000
Suzuki Kizashi Sport Sedan "Sled"	\$7,000,000	-2%	\$7,100,000
Toyota Camry "Toyota Reinvented"	\$7,000,000	21%	\$333,000
Toyota Camry "Two Worlds"	\$3,500,000	21%	\$166,000
Volkswagen Beetle "The Dog Strikes Back"	\$8,800,000	16%	\$561,000

Lowest and Highest Cost per Share of Automotive Shoppers Gained

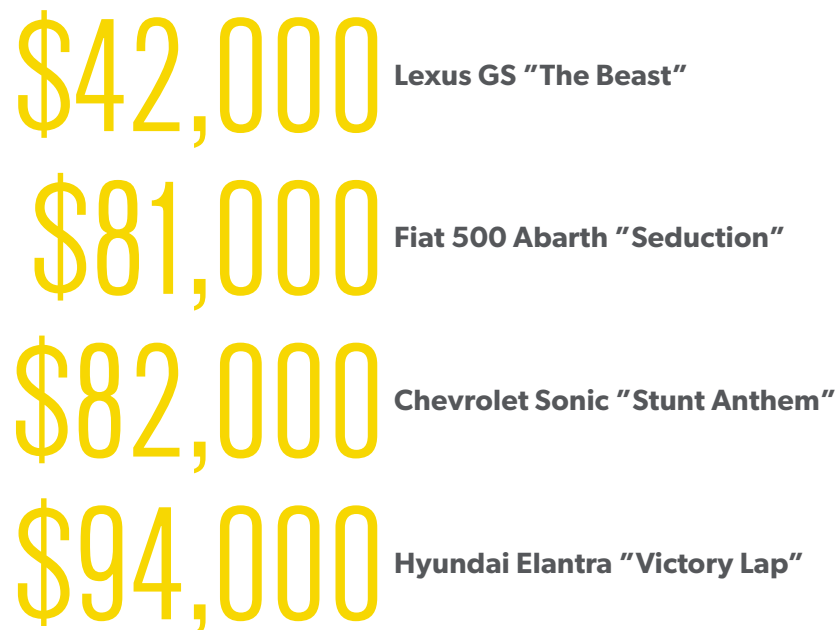
Making its first Super Bowl appearance, Lexus achieved strong ROI—gaining 84 percent share of automotive shopper growth and achieving the lowest estimated price per share of shopper gained at \$42,000—though the spot received mixed reviews. Following Lexus are the same advertisers who earned the highest share growth, the Fiat 500 Abarth and the Chevrolet Sonic, achieving an estimated \$81,000 and \$82,000 spent per share of shopper gained. The Hyundai Elantra “Victory Lap,” which achieved 37 percent share growth and an estimated \$94,000 spent per share of shopper gained, is also noteworthy.

Not all succeeded, however. The Honda CR-V had the highest price spent per shopper gained at \$18.1 million, resulting in a negative return in share. The Suzuki Kizashi “Sled” and Audi’s “Vampire Party” spots joined the CR-V in the second and third highest spend per share gained at \$7.1 and \$6.9 million.

Key Takeaways

The Super Bowl sets the standard in advertising excellence, yet only a few advertisers succeeded in making a big impact and sustaining shopper interest. The automotive industry has expanded its presence and seeks consumer engagement prior to the Big Game as well as after, maximizing the hefty investment in Super Bowl advertising. The ROI measurement becomes more interesting as the creative is consumed across multiple platforms and consumers engage with Super Bowl content across many platforms and devices. ●

Lowest and Highest Cost Per Share



Lexus’ first Super Bowl appearance provided an 84 percent share of automotive shopper growth— achieving the lowest estimated price per share of shopper gained



image source: autoblog.com

The Battle of the Bestselling Midsize Sedan

Revealing the top contender among online consumers for the race to be the best-selling midsize sedan

In 2013 Nissan battled Toyota for the bestselling midsize sedan spot—a move the automaker’s CEO Carlos Ghosn touted at the New York Auto Show in April—hoping the Altima has what it takes to overcome longtime segment frontrunner Toyota Camry.

To gauge how both automakers’ marketing efforts were going at mid-year, we evaluated the behaviors of our audience of more than 14 million car shoppers, to reveal the top contender among online consumers. We analyzed Nissan Altima and Toyota Camry web traffic data, including unique users, page view volume, sedan segment share of shoppers, and cross-visitation statistics, to assess consumer intent for both vehicles across our portfolio of 12 automotive shopping and enthusiast sites.

Jumpstart Cross-Shopping Data

Early in the year (January 2012), approximately 28 percent of Nissan Altima consumers cross-shopped Toyota Camry, while 19 percent of Camry consumers cross-shopped Altima—a difference of roughly 9.5 percent.

In May 2012, the cross-shopping gap had shrunk to a difference of only 1.5 percent. The rate of Nissan Altima consumers who cross-shopped Toyota Camry was 18 percent, while the rate of Camry consumers who cross-shopped Altima was 17 percent.

Nick Matarazzo, CEO of Jumpstart, weighed in on the heated competition:

“Nissan is going toe-to-toe with Toyota right now to capture market share and come out on top. Altima is making great strides this year with online car shoppers in our network. Even though sales of the Altima dipped in April, shopper interest across Jumpstart’s sites did not. On the flipside, Toyota’s revamped Camry SE is making inroads with a younger set of buyers—the demographic with which Altima has traditionally resonated best.”

Matarazzo pointed out that while Nissan was quickly closing the gap between the Altima and the Camry, Honda Accord still remained the sedan segment

leader across Jumpstart's network, with a 7.3 percent average monthly share of Jumpstart sedan shoppers.

"Right now, Nissan and Toyota are battling for the number two spot in the midsize sedan segment. And we've been keeping our eye on other contenders, like Ford Fusion, Hyundai Elantra and Sonata, and Kia Optima that are closing the ranks."

The Marketing Campaigns

Nissan Altima Highlights

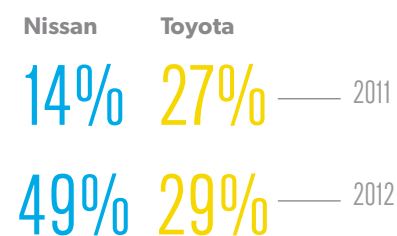
- » In June 2012, Nissan launched its largest-ever marketing campaign for the 2013 Altima, with a heavy blend of broadcast, digital, print and out-of-home, including trendy 3D movie spots
- » Heavy incentives for outgoing 2012 models and the introduction of the 2013 Altima and related marketing drive prompted the best-ever Altima sales month in July, up nearly 25 percent from the prior year
- » The automaker relied on social media channels Twitter, YouTube, Facebook and Google with "Innovation Garage" and "Altima Experience" to reach its prime target of younger car buyers

Toyota Camry Highlights

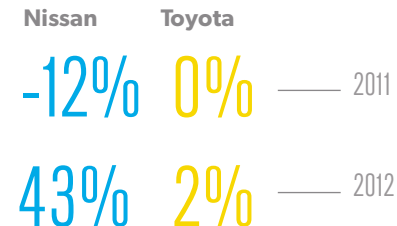
- » In October 2011, Toyota launched the reinvented 2012 Camry with an aggressive marketing push in broadcast, print, digital, social media, out-of-home, drive events, and multicultural campaigns
- » In 2012, Toyota Camry Super Bowl commercials netted an average 21 percent gain in share of shoppers across Jumpstart's network of automotive sites in the three weeks following the game
- » Toyota's redesigned Camry, particularly its sportier SE edition, attracted a much younger set of car buyers (approximately nine years younger) helping to spur a Camry sales increase by almost 40 percent through July 2012 ●

The Results of the Nissan Altima vs. Toyota Camry Traffic Put to the Test

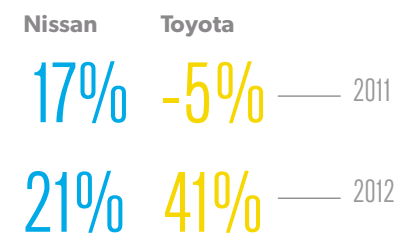
Unique User Traffic Growth



Share of Sedan Shopper Growth



Vehicle Sales Growth in Units



*Units are monthly averages.

How to Maximize Social ROI

#1

Be Active in Free Presence and Passive in Paid

In 2012, Nick Matarazzo, CEO of Jumpstart, outlined simple advice to help auto advertisers best maximize their marketing investments, to increase awareness on Facebook and ultimately sell more cars through social media and beyond.

He commented on a surprising announcement by GM at the time:

“GM’s back-and-forth indecision about paid Facebook advertising—first, its announcement in May to end roughly \$10 million in yearly paid Facebook ads, and its recent discussions to buy ads on Facebook once again—has left marketers confused.”

When a company like GM pulls paid Facebook ads, people wonder if it’s smart marketing or a marketing mishap. Facebook and other social media channels can be excellent advertising opportunities but behemoth traffic shouldn’t be the only consideration for an ad buy.”

Matarazzo said there are simple guidelines advertisers should follow to ensure they’re getting the biggest bang for their marketing buck.

#2

Use Facebook for Branding and Buzz

1) Be active in free presence and passive in paid (until improvements are made)

Matarazzo believes social media should be part of a successful integrated marketing campaign. However, when given a choice, he advises marketers to enhance their free page presence with content that bolsters user engagement while maintaining a more passive presence in paid ad investments until improvements are made to better measure performance.

“Studies show the benefits of paid social media advertising, like that on Facebook, are still not completely understood,” said Matarazzo. “Users are there primarily for socializing which has made paid ads generally ineffective for directly influencing vehicle purchases or driving leads.”

A primary improvement, according to Matarazzo, would be Facebook’s ability and/or willingness to accept third-party ad tags by accredited servers, ad agencies or research firms, giving advertisers more flexibility and control when it comes to reaching users, and the ability to track performance.

#3

Go Where the Car Buyers Are

“Without third-party tags, you’re lucky to see \$10 from an automaker, let alone \$10 million,” said Matarazzo.

For the time being, he believes money is better spent in the development of content at a company’s free brand page—content provocative and interesting enough to solicit user input, to generate a sizable fan base, to be “liked,” voted on and/or shared among users, or through apps that prompt user participation in creative and sophisticated ways.

Matarazzo says that while this strategy may be great for big auto brands, dealers might want to take a slightly different approach, such as updating followers on important events at the dealership, soliciting customer feedback and engaging in conversations with users about their dealership experience.

In both situations, it’s critical for brand owners to stay on top of things to actively and consistently engage with their audience along the way. This could mean anything from implementing promotions or giveaways on a regular basis to participating in daily conversations—about both positive and negative opinions—regarding an automaker’s products or dealership experience.

“The brands and businesses that show a consistent willingness to address concerns head on will come out winners,” said Matarazzo. *“Successfully turning a negative experience into a positive one can sometimes be more beneficial than all the positive feedback combined.”*

2) Use Facebook for branding and buzz

Matarazzo cites Ford’s ultra-successful, one-day Facebook “unveiling event” of its 2011 Ford Explorer in July 2010 as a textbook example of the most effective use of Facebook for automotive marketing—a campaign that generated buzz months before the Explorer was available on dealer lots.

Ford used videos, photos and live chats between Facebook users and various Ford employees, including CEO Alan Mulally, exclusively and solely at Facebook for the reveal—an auto industry first. The automaker coupled its Facebook campaign with strategic ad buys and “like” button-embedded display to reach

Matarazzo believes social media should be a part of a successful integrated marketing campaign



more than 50 million people at Facebook and a host of other sites to drive traffic to (and increase engagement at) the Explorer Facebook page.

The results were staggering. Even before the reveal, Ford surpassed its goal of 30,000 Facebook fans. Across Jumpstart's network of 14 automotive shopping and enthusiast sites, the reveal spurred a 104 percent increase in shoppers researching information about the Ford Explorer on the day of the unveiling.

"Ford's campaign was successful because it made Facebook users feel like they were part of something special, like they were members of an elite club who had access to something others didn't, engaging in ways others couldn't," said Matarazzo.

He says that while Facebook isn't ideal for driving leads, it's best at generating buzz around an event, company or product while breeding passionate "brand responsiveness" that will, over time, have an impact on lower funnel purchase activity.

3) Go where the car buyers are

Of the 77 percent of new vehicle buyers who use the Internet in the shopping process, nearly 80 percent visit at least one third-party website in the six months leading up to purchase, a statistic Matarazzo says is critically important.

"Engaged, in-market shoppers are looking for detailed vehicle specs, accurate pricing and the ability to compare vehicles," said Matarazzo. *"Since this highly targeted audience turns to third-party automotive websites to find this information, that's where automotive marketers ultimately need to be."*

However, having a third-party automotive ad presence is one thing—knowing how to effectively leverage it is something altogether different. Matarazzo says most advertisers have a solid handle on the fundamentals such as traffic, demographics, quality of audience, placement, frequency, messaging and creative. However, he says many don't when it comes to more specialized marketing tactics such as:

- » How Tier II and Tier III marketers can use third-party automotive websites to impact local and regional purchase intent
- » How upper funnel sponsorship placements can increase consideration, share of shopping, leads and overall ad performance
- » How a blend of contextual and audience targeting can increase brand awareness, favorability, message association and auto purchase intent by as much as 60 percent ●

“**I believe advertisers would be far more successful worrying less about paid social media advertising and more about optimizing what they're currently doing at third-party auto sites. These are the websites that influence purchase consideration and drive leads. Marketers simply need to learn how to reach car buyers at these sites better than they do now.**”

NICK MATARAZZO
CHIEF EXECUTIVE OFFICER

Paint a Bigger, Better Brand Health Picture

True Market Impact, Jumpstart's custom reporting tool, helps marketers better understand how their overall brand and marketing efforts resonate with consumers

How can digital marketers better see the forest through the trees? The forest in this example is the overall health of a particular brand. The trees? The perception (or rather, misconception) that online shopper behaviors are the attached-at-the-hip result of online marketing campaigns.

If that were the case, we'd be missing the forest.

The behaviors of online consumers tell us a great deal about the impact of larger media campaigns—both online and offline—and in many instances, are solid indicators of actual sales.

This became especially clear when Jumpstart analyzed the impact several larger integrated marketing campaigns had on online consumers by using Jumpstart's proprietary data analysis and reporting system, [True Market Impact™ \(TMI\)](#).

TMI is used to better understand how a particular brand resonates with consumers by analyzing car shopper consideration, engagement, competitive share of market, market demand and purchase intent. Since most automotive shoppers use third-party sites such as those in our network to assist in their shopping and research process, their behaviors and activities are critical in evaluating marketing effectiveness.

When Audi introduced a lighter, funnier side to its brand last year with the "Luxury Prison" Super Bowl commercial and viral campaigns on TV and YouTube such as "Stolen Audi" and "Meet the Beckers," the automaker grew in share by 20 percent to become the only luxury brand ranked in the top 10 of all shoppers in the Jumpstart portfolio (roughly 14 million monthly visitors).

Not only did Audi's creative resonate well with both a younger and older demographic, its use of traditional and interactive media campaigns enabled it to capture competitive market share from more familiar luxury brands—BMW, Mercedes and Acura—across multiple vehicle segments, including sedans and luxury crossovers.

Ford's "The Fiesta Movement" campaign—a lifestyle play that relied heavily on viral, social and interactive media—generated significant buzz for the vehicle even before it hit dealer lots. The Fiesta jumped an astounding 57 percent to the top of the Jumpstart compact vehicle segment in 2011 and in 2012, it represented a significant 16 percent share of this same category.

From an overall brand perspective, Ford's product and marketing improvement efforts enabled it to increase share of all shopper interest to 14 percent on Jumpstart sites and—most surprisingly—increase 2011 sales by 17 percent.

Finally, Kia increased its digital investment (including online video) in its "Urban Hamster" campaigns at a time when other OEMs were cutting back digital spend. This aided Kia, and parent company Hyundai, in boosting consideration and brand engagement among Jumpstart's shoppers—with Sportage, Sedona and Rio holding top 10 positions in each of their respective vehicle segments. Today the Kia brand maintains the 10th highest share of shopper interest in our network.

Kia's 2011 sales saw a 34 percent increase vs. 2010 when many other manufacturers saw sales declines.

From mass media Super Bowl advertising to online viral campaigns, digital to traditional, online shopper behaviors are excellent real-time brand barometers. The forest can mean major sales revenue. So tell the trees to take a hike. ●

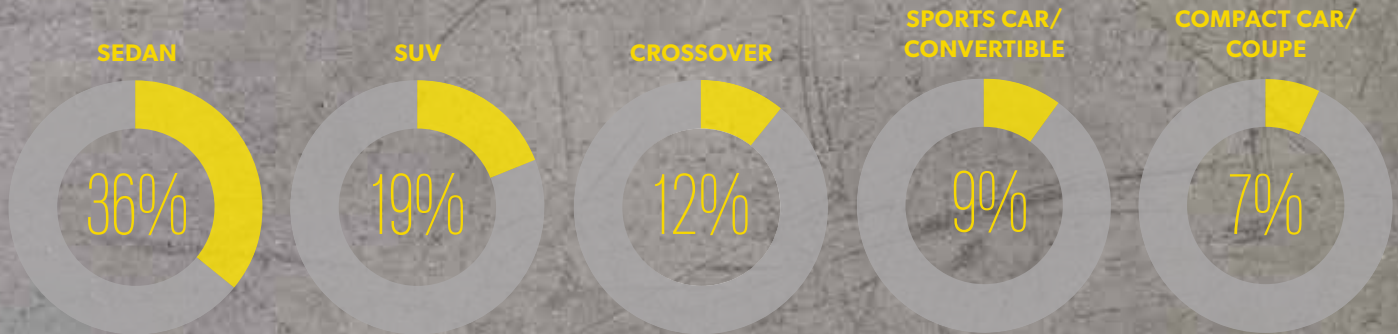
Kia increased its digital investment at a time when other OEMs were cutting back digital spend. Kia's 2011 sales saw a 34% increase over 2010.



image source: korusjournal.com

Online Shopping Trends

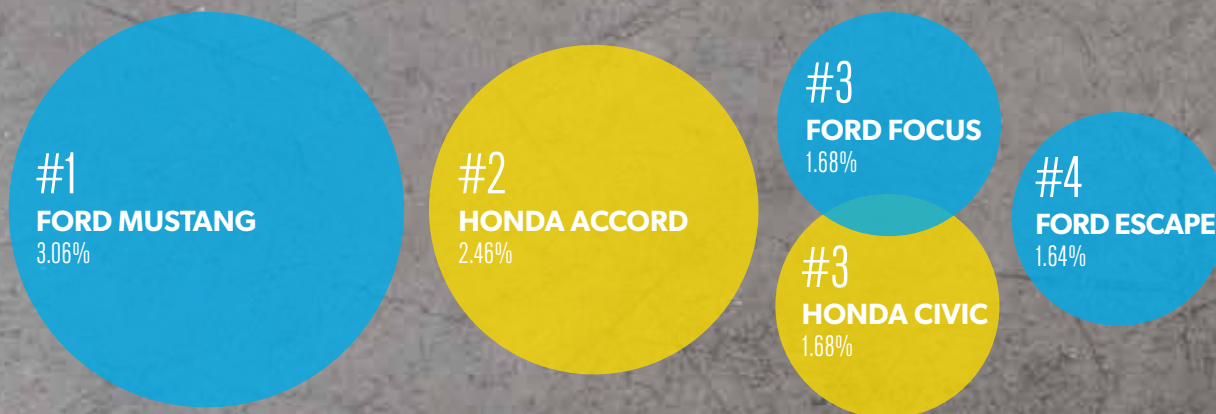
Most Popular Vehicle Segments



Most Popular Brands

VEHICLE BRANDS	CY 2011	CY 2012	% VARIANCE	SHARE-POINT VARIANCE
Ford	13.9%	14.0%	1%	0.14%
Chevrolet	10.5%	9.5%	-10%	-1.01%
Toyota	10.1%	9.1%	-9%	-0.93%
Honda	8.4%	7.4%	-12%	-1.05%
Nissan	5.5%	6.1%	11%	0.62%

Most Researched Models

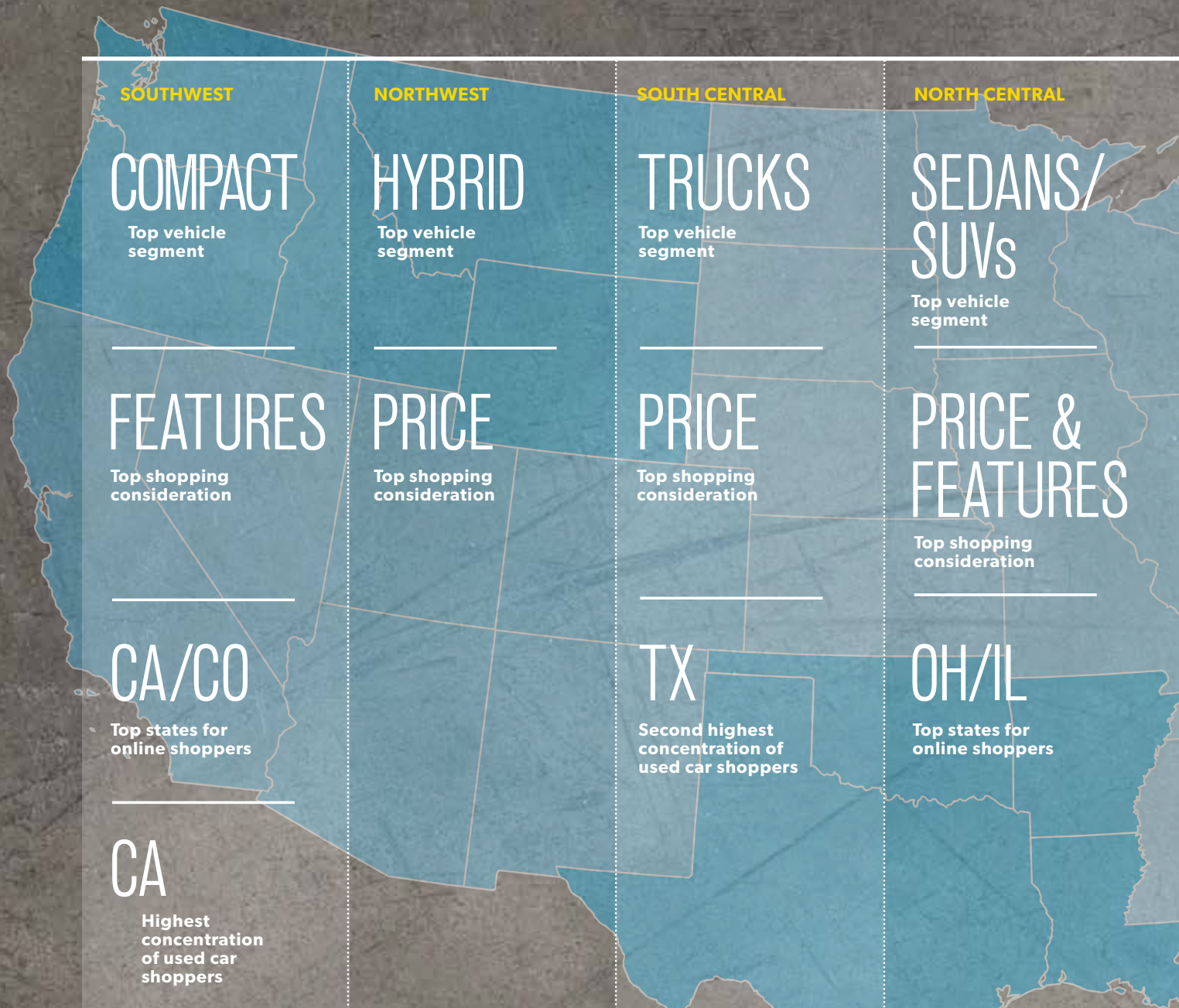


2012 Online Automotive Insights

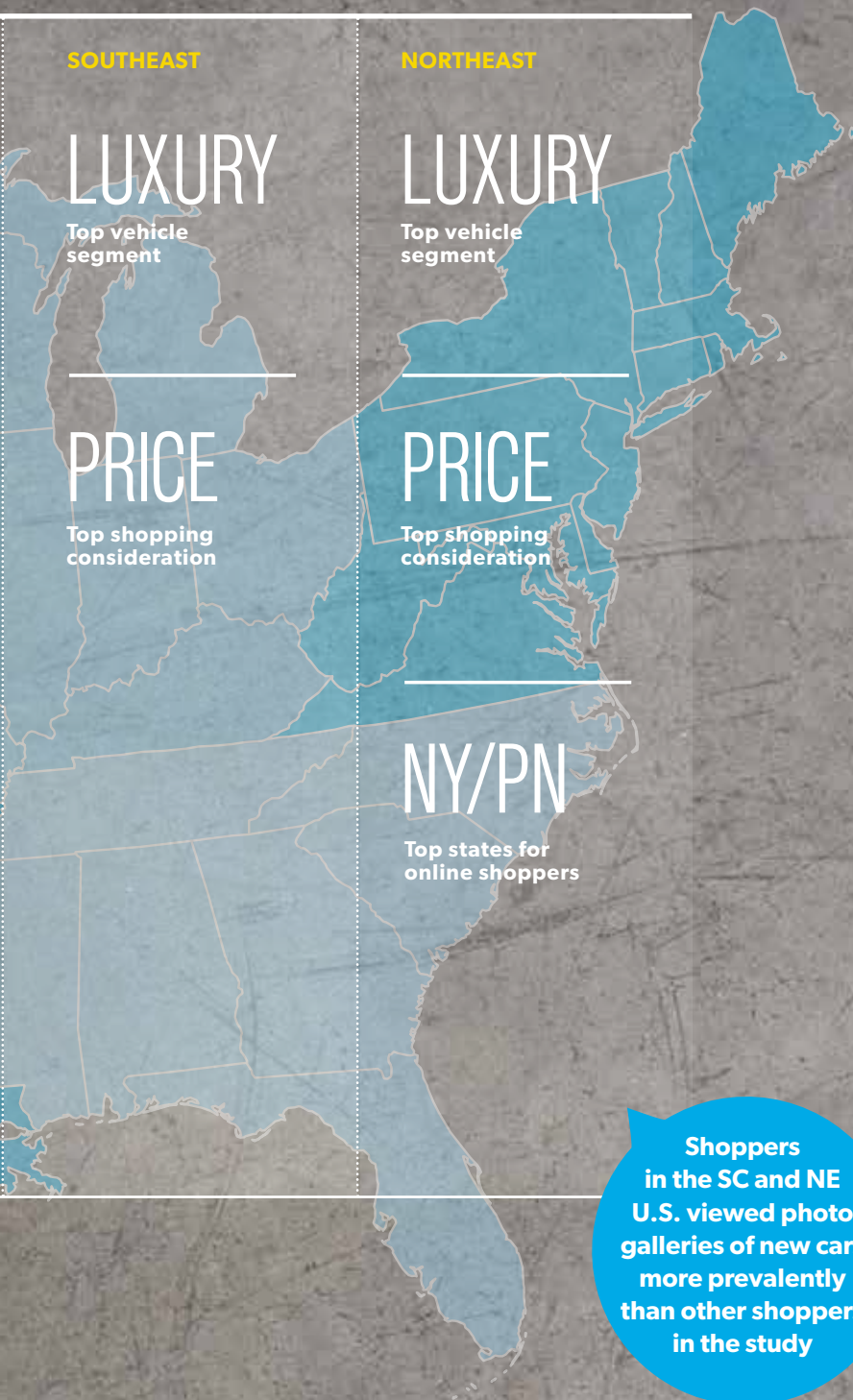
- 01** At mid-year Ford Edge was jumping ahead with a 10 percent increase in share of shoppers that eventually tapered off at 4.4 percent. Looking ahead we expect the gap to close even more between Edge and front-runner in the Crossover segment, Chevrolet Equinox.
- 02** Early 2012 drop-off in alternative fuel vehicle interest was recovered by year-end with nearly seven percent increase and is expected to capture more growth as a number of new models are introduced to the segment throughout 2013.
- 03** Chevrolet Corvette was a new addition to the top 10 most popularly researched models across Jumpstart's sites in 2012. This reconfirms the growth trajectory that was anticipated among aspiration vehicles starting late in 2011 and carrying through 2014 at least.
- 04** Nissan Altima was another new addition to Jumpstart's top 10 most popularly researched models list. The gap between Nissan Altima and Toyota Camry should continue to shrink throughout 2013 as Nissan continues to forge deeper online shopping inroads with its robust digital marketing initiatives.

Libby Murad-Patel, Senior Director of Strategic Insights, outlines her take on 2012 online shopping and the sales and marketing initiatives making the biggest impact with Jumpstart shoppers

Regional Online Automotive Shopping Trends



Jumpstart Strategic Insights analyzed the consumer behaviors of roughly 19 million monthly unique users across Jumpstart's portfolio of automotive websites from January to June 2012, in conjunction with an analysis of regional indicators, to draw connections between specific U.S. territories and the most popularly researched vehicles and top car shopping considerations among consumers within those territories.



“It’s interesting to see the role socioeconomic factors such as employment, income and standard of living, and the social and cultural influences of a particular region—drive online consumer consideration. Even geographic aspects like weather and transportation systems play a part. Our audience of nearly 20 million monthly car shoppers has helped us paint a market-reflective picture of the vehicles people want based on the areas in which they live.



LIBBY MURAD-PATEL
SENIOR DIRECTOR OF STRATEGIC
INSIGHTS



BES

BEST IN
SHOW

2012 – 2013

Closing the Book on 2012 and Looking Ahead to 2013

Anticipated growth in the Alternative Fuel segment still leaves a question in mind as to how much growth will be seen among clean diesel

Looking back at the past year of automotive advertising and digital media, 2012 marked another year of solid growth. Of course, there were some hurdles—most notably the European auto crisis, which nearly threatened the steady recovery of the U.S. There were also product and marketing challenges brought on by the recalls from Toyota, Honda and Ford, as well as Hyundai/Kia being called out by the EPA for overstating mileage claims.

But it was also an especially great year for media and advertising. We saw a big comeback for auto advertisers in the Super Bowl, and they maintained a strong presence throughout Hollywood's award season. Fast-forward to summer for one of the biggest sponsorship events—across all ad categories—at the Summer Olympics in London, which raised approximately \$3.8 billion in support. And an estimated \$78 million in online advertising was spent on the 2012 Presidential election, an increase of 251 percent from the election four years ago.

Automotive Advertising Successes:

We celebrate the brands that are making bolder marketing decisions, showing growth and innovation not only in their products but also in their ability to speak to consumers. Here are three that stood out in 2012:

- ⇒ **Subaru** had a great year by tugging at heartstrings and connecting with consumers. Most notably the Impreza "200,000 Miles" campaign, its "Support" campaign that aired two spots and features the Impreza in one and the Forester in the other. Also, the fifth iteration of Subaru's "Share the Love" donation-on-purchase platform was launched in August and included a new Facebook tie-in to continue the connection with consumers. These campaigns stood out for their creativity and ROI: Subaru saw 26 percent growth in unit sales volume over 2011 in the U.S. and they experienced a 15 percent increase in share of brand shoppers on Jumpstart's site.

⇒ **Nissan** came out of the gate making bold statements around the 2013 Altima's ability to knock Toyota Camry from the top-selling midsize sedan pedestal that it held for 11 years straight. Although it wasn't able to achieve this in 2012, great strides were made in reaching progressive buyers with its "Innovation that Excites" corporate messaging. We also credit Nissan for releasing spots that only revealed small glimpses of the vehicles' exterior design features, teasing consumers to want to see more. Additionally, humor was used in two spots titled "Enough" and "Breakup," showing how the brand is progressive, innovative and has a fun and humorous side to them. Altima came in third at the end of 2012 and saw 11 percent growth in sales volume over 2011, while Nissan's entire lineup came in at an eight percent increase. Across Jumpstart's shoppers, Nissan gained 11 percent in share of brands across our sites.

⇒ **Lincoln Motor Co.** is looking to reinvent itself and make stronger inroads in the highly competitive luxury segment. By rebranding as the Lincoln Motor Company to set the brand apart from only being grouped under the Ford umbrella, Lincoln showed how serious they are about moving forward as a luxury contender. Releasing its corporate branding campaign with "The Lincoln Motor Company Journey," the brand paid homage to its roots and history, highlighting the need to know where you come from, not trying to be everything to everyone and moving forward by looking back. The drastically redesigned 2013 MKZ is featured in these break-through spots and shows the commitment to advancing as a top Luxury contender. Though more is to be seen in 2013, the Lincoln MKZ showed real strength in gaining the highest share of Jumpstart shoppers immediately following its Super Bowl spot, and nearly three times greater than the next closest Super Bowl contender. We expect to see this early success in creative, media execution and consumer interest extend throughout 2013.

Subaru "Share the Love"



image source: You Tube

Nissan "Breakup"



image source: You Tube

Lincoln "Journey"



image source: You Tube

Trends to Expect in 2013

#1

Entry-Luxury Explosion and Luxury Competition

#2

Continued Battle of the Midsize Sedan

#3

Expansion of the Alternative Fuel Segment

What Else to Expect?

Already having glimpses into 2013, a few trends to continue and some new ones emerge:

1. Entry-Luxury Explosion and Luxury Competition:

We've seen competition heating up across luxury auto brands for the past two years. While German manufacturers were dominating two years ago, we're anticipating significant growth among some Asian brands, such as Lexus and Acura, and domestic brands, such as Lincoln and Cadillac. The luxury category is seeing a lot of movement and product introductions in the entry-luxury lineup, which is where some of the previously mentioned will see great success. German brands are ready to compete here as well. Mercedes-Benz has teased the release of its new CLA-Class with a highly publicized price tag of less than \$30,000.

2. Continued Battle of the Midsize Sedan:

There is not much more to be said about the continued battle that we anticipate seeing between Camry, Accord, Altima and Fusion as we roll through 2013. This highly competitive segment holds 36 percent share of Jumpstart shoppers and is anticipated to remain flat and perhaps see another percentage point increase in 2013. While both product quality and marketing efforts are expected to help move the needle for these brands, they should be cautious of not just losing share among each other, but also keep an eye out for competitors such as Kia Optima, Subaru Impreza, and Hyundai Sonata.

3. Expansion of the Alternative Fuel Segment Including Clean Diesel Adoption:

Because the government-enforced fuel-efficiency standards are in place, we anticipate continued growth in this Alternative Fuel category which includes hybrid, electric, clean-diesel, and fuel cell technologies. One particular area of opportunity is in the clean-diesel category, where there seems to still be a perception problem among consumers. German brands Volkswagen, Audi, Mercedes-Benz and BMW all have an opportunity to drive the education among American consumers and make inroads before many domestic and Asian competitors.

2013 is sure to bring forward another exciting year in the automotive advertising world driven by challenging sales goals, the need for product differentiation and the challenge of corporate responsibility. After seeing 14 percent growth in U.S. Light Vehicle Sales from 2011 – 2012, analysts from Polk are estimating a more modest seven percent growth in 2013, bringing total new sales volume to \$15.3 million. NADA estimates are very close to Polk at \$15.4 million, one

million more than in 2012. As always, economic factors such as interest rates, employment, and housing sales will drive some of the movement in automotive sales, but a major factor that can make or break the forecast this year will be stabilization of gas prices.

Jumpstart will continue to monitor these trends and more.

If there is one thing we know for sure—2013 is going to give us plenty to talk about. ●



Jumpstart Automotive Group: Expert Marketing Data and Insights

Jumpstart Automotive Group, a division of Hearst Magazines, is an expert digital automotive marketing organization providing the latest online and mobile ad products, creative services and intelligent analytics to the nation's leading automotive advertisers and publishers.

The Strategic Insights and Analytics department publishes automotive industry data and market intelligence based on audience behaviors and advertising campaign analytics across a vast portfolio of publisher sites and the millions of consumers who visit these sites every month.

This data is critical in helping our partners understand the automotive shopping process on third-party websites and how advertisers influence consumers as they shop for their next vehicle purchase.

In 2012, Jumpstart's Strategic Insights team dug deep into online and mobile audience shopping and research behaviors to explore the targeting, creative, placement and messaging strategies that successfully move car shoppers closer to the point of purchase.

These analyses and insights are aimed at helping advertisers and publishers gain a better understanding of the most effective way to impact car shoppers, to optimize their digital automotive marketing strategies.

Follow us throughout 2013

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