



LOOKING  
BACK  
/  
LOOKING  
AHEAD

2013–2014

INDUSTRY TRENDS AND INSIGHTS

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# We're Back And Better Than Ever

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After holding off on big-ticket purchases during the recession, consumers are buying again, which we can attribute to a rebounding housing market (new home construction saw a six-year high in November), rising employment, and strong consumer confidence.

There's strength across all segments. Trucks have made a serious comeback (total truck sales were up 12% from prior year) and luxury is on the rise.

Digital advertising spending continues to surge (spending surpassed \$20 billion in the first half of the year, up 18% from the same period in 2012). And mobile consumption is up—more than 30% of visits to Jumpstart's sites last year came from a mobile device.

We've been busy heralding in a new era here at Jumpstart. This year marked the beginning of a long-term partnership with automotive software giant Dealer.com (now part of Dealertrack Technologies, the leading provider of on-demand software for the U.S. auto industry) and the addition of automotive Internet pioneer Autobytel to our portfolio of publishers.

Each year, we study the shopping behavior of more than 25 million in-market shoppers to understand which vehicles are maintaining, gaining, or losing consumer interest. For this year's edition, we looked at automotive brand statistics, vehicle segment comparisons, regional shopping trends, and more to help our partners send the right message, to the right customer, at the right time.

As always, it is our goal to give you the insights and best practices you need to make the best marketing and advertising decisions. It's good for you. Good for us. And good for the industry.

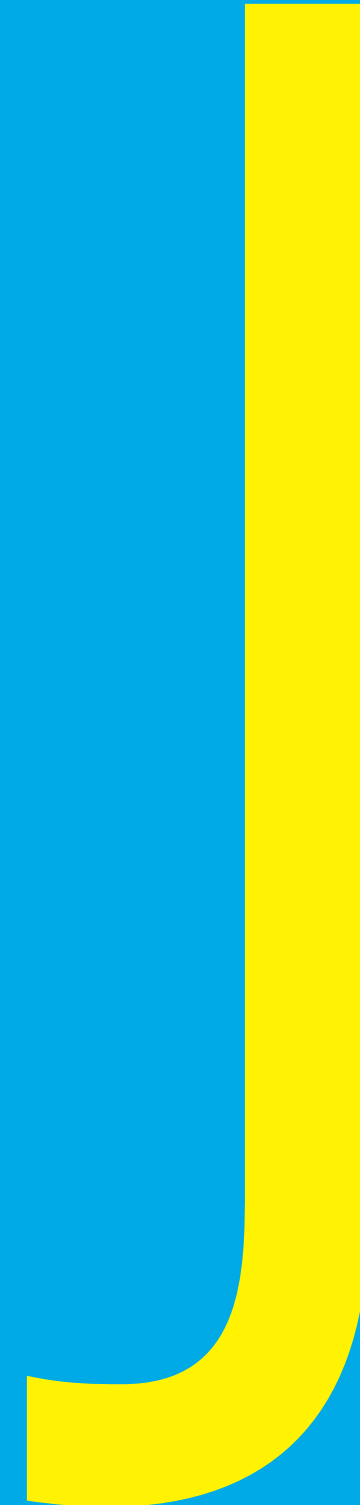
Here's to moving more metal in 2014.

Yours Truly,



**Nick Matarazzo**

CEO, Jumpstart Automotive Group



**Jumpstart Automotive Group is a digital automotive marketing company that exclusively represents a portfolio of publishers, including *U.S. News Automotive, Car and Driver, J.D. Power Autos, NADAguides, and Autobytel.***

**Jumpstart works with all auto manufacturers, providing marketing solutions and access to one of the largest, most diverse, and highest-performing in-market automotive audiences.**

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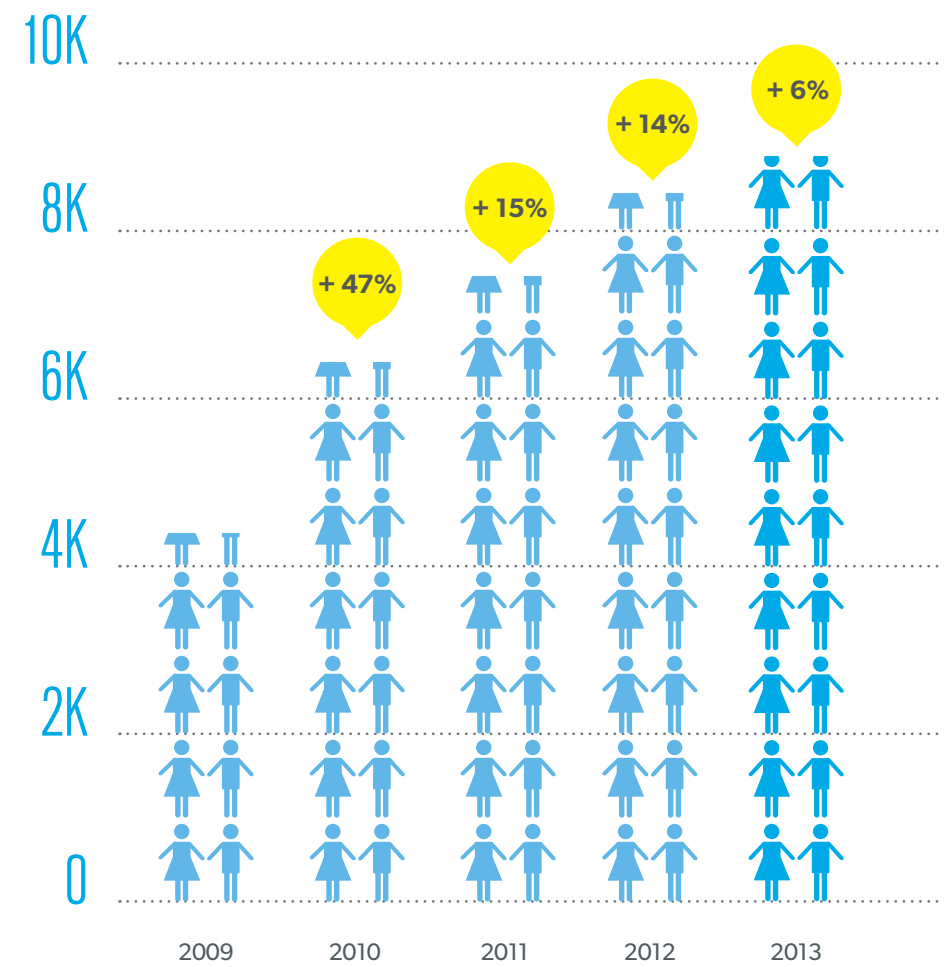
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# Unique Visitors Continue To Grow

Jumpstart Has 6% Growth In Unique Visitors Across Its Portfolio Of Publishers

## Average Monthly Unique Desktop Visitors By Year

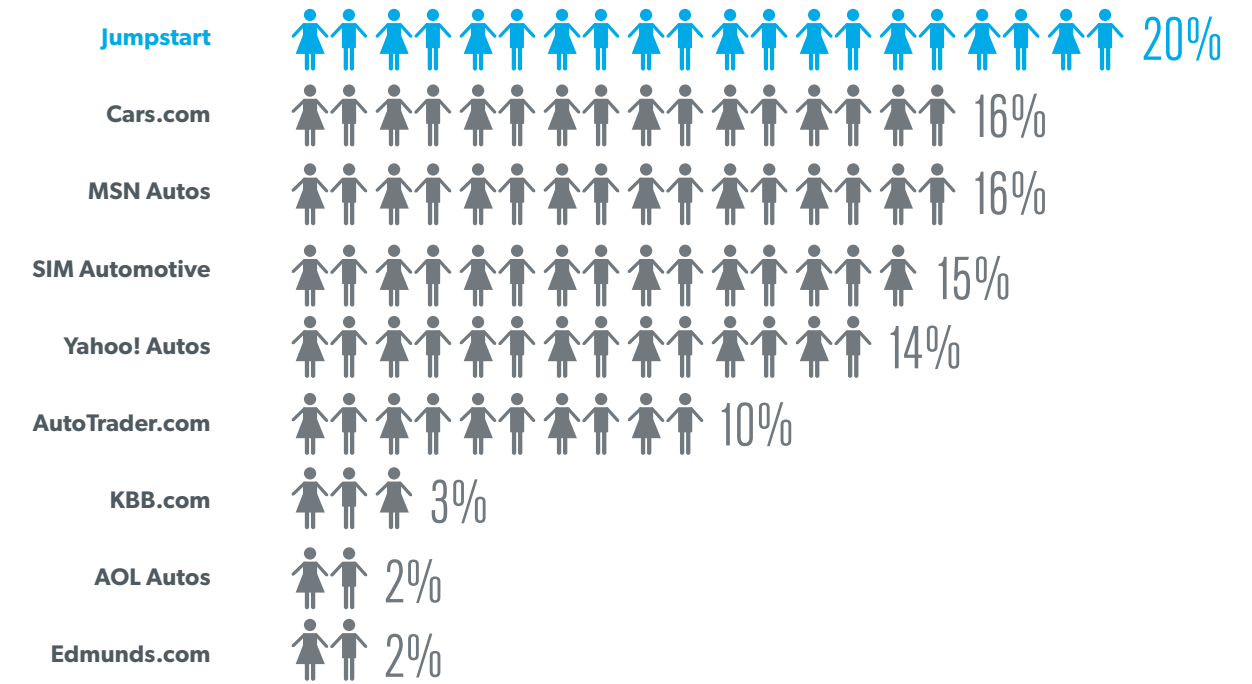


\* comScore Media Metrix, January 2009 – December 2013

# Increases In Unique Visitor Volume Every Year Since 2009

Jumpstart Is The Only Automotive Site Among Its Competitors To Have Annual Growth 5 Years Straight

## Average Annual Growth Rate



\* comScore Media Metrix, January 2009 – December 2013

# 82% Of Jumpstart's Audience Is Unique

The Majority Of Jumpstart's Visitors Are Not Viewing Competitor Sites

## Cross Visitation Among Competitors

COMPETITOR	TOTAL AUDIENCE (000)	JUMPSTART AUDIENCE VIEWING COMPETITOR	COMPETITOR AUDIENCE VIEWING JUMPSTART
Yahoo! Autos	11,852	17%	12%
SIM Automotive	8,234	19%	20%
AOL Autos	7,491	15%	17%
AutoTrader.com	6,956	26%	31%
MSN Autos	6,822	14%	17%
KBB.com	5,734	15%	23%
Cars.com	5,339	19%	30%
Edmunds.com	4,494	17%	33%

18%

On average, only 18% of Jumpstart's audience is viewing a competitor's site

23%

23% of the competitors' audience is viewing a Jumpstart site

\* comScore Media Metrix, October 2013 – December 2013

# The 2<sup>nd</sup> Highest Time Spent And Total Pages Viewed

Jumpstart Continues To Have High Engagement In 2013

## Engagement Among Jumpstart And Competitors

MEDIA	TOTAL MINUTES (M)	TOTAL PAGES VIEWED (M)	AVERAGE VISITS PER VISITOR
Yahoo! Autos	77	79	3.1
<b>Jumpstart</b>	<b>98</b>	<b>120</b>	<b>2.7</b>
SIM Automotive	32	49	2.8
AOL Autos	34	52	2.1
AutoTrader.com	159	200	2.4
MSN Autos	49	106	2.4
KBB.com	40	77	1.6
Cars.com	96	120	2.6
Edmunds.com	27	32	1.8

\* comScore Media Metrix, October 2013 – December 2013

# A Growing Mobile Audience

Jumpstart Ranks 1<sup>st</sup> In Mobile Unique Visitors Among Its Competitors

## Multi-Platform Audience

MEDIA	TOTAL DESKTOP & MOBILE VISITORS (000)	TOTAL MOBILE VISITORS (000)	EXCLUSIVE MOBILE VISITORS(000)
<b>Jumpstart</b>	<b>12,353</b>	<b>4,698</b>	<b>3,864</b>
AutoTrader.com	9,572	3,274	2,597
Yahoo! Autos	14,551	3,262	2,694
Cars.com	7,965	3,159	2,625
Edmunds.com	6,862	2,721	2,367
SIM Automotive	10,592	2,542	2,189
AOL Autos	10,933	2,462	2,114
KBB.com	7,563	2,167	1,829
MSN Autos	7,854	1,192	1,031

82%

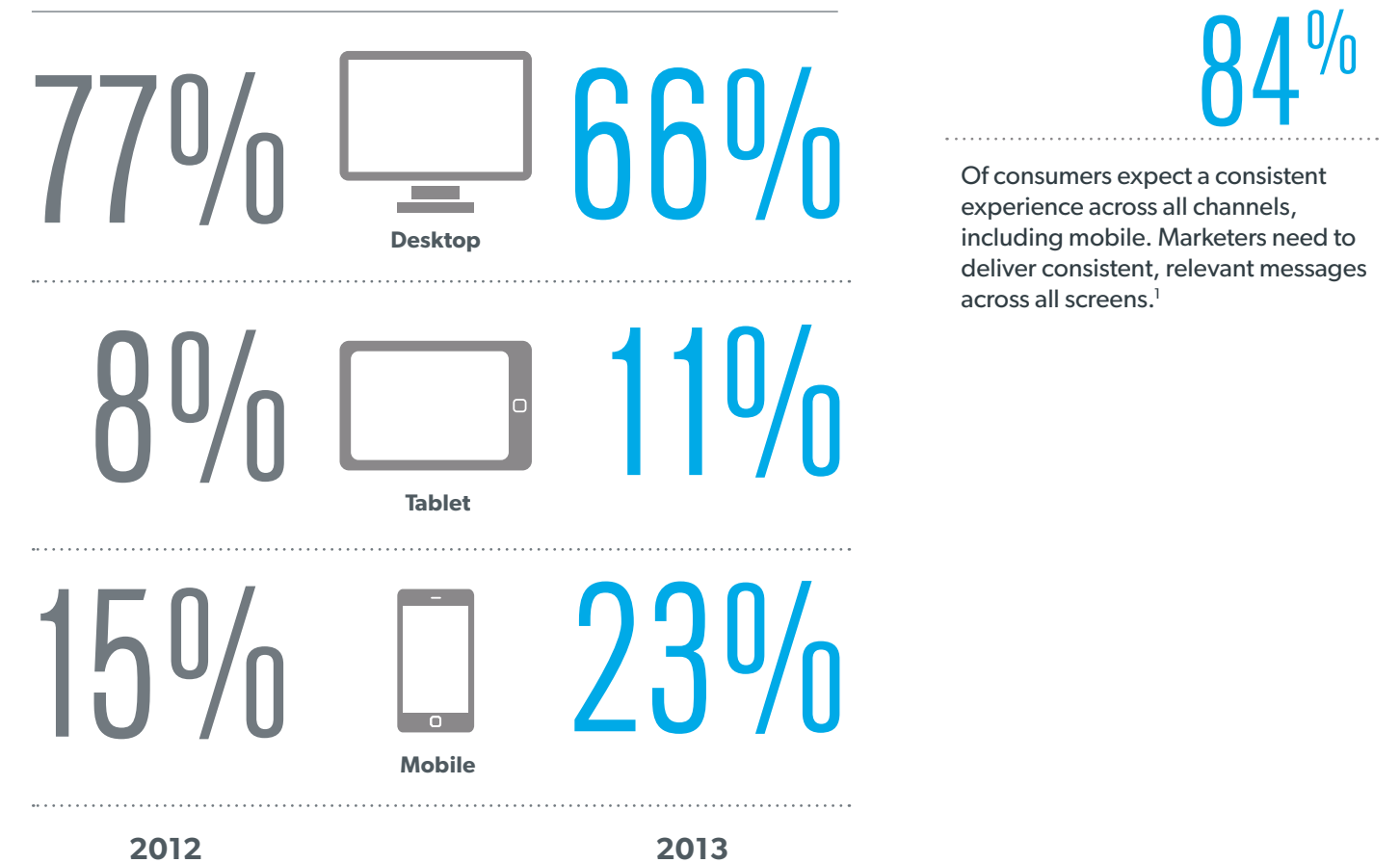
A majority of Jumpstart's mobile audience visit exclusively from a mobile device—giving it the highest exclusive mobile audience among its competitors

\* comScore Media Metrix, Multi-Platform, October – December 2013

# Shoppers Increasingly Use Tablets And Smartphones To View Sites

Usage Of Tablets And Smartphones Is Up 38% And 53%, Respectively

## Jumpstart Visitors By Device

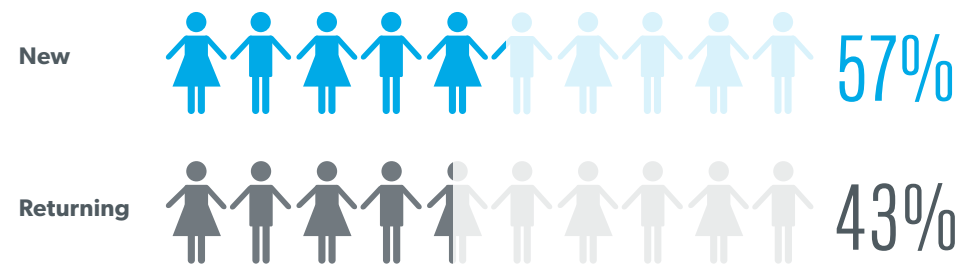


\* Google Analytics, January 2012– December 2013  
1. Mobile Marketing Association Survey, 2014

# Majority Of Traffic Comes From Search, Most Visitors Newcomers

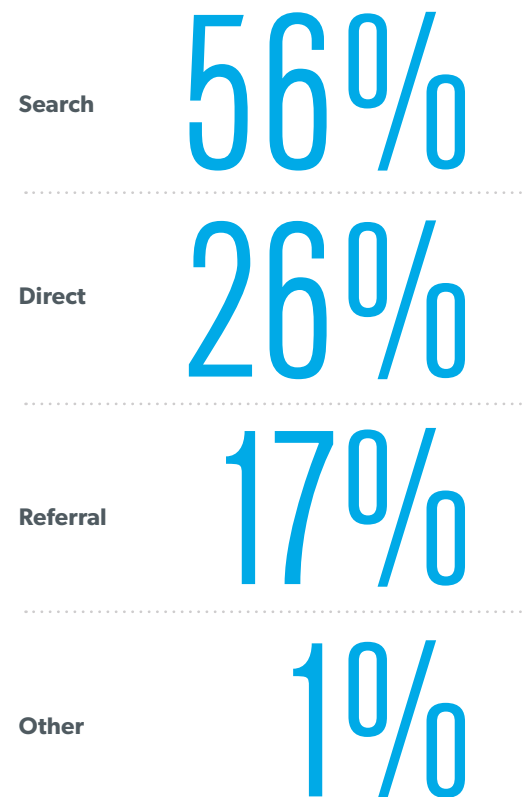
Search Makes Up 56% Of Jumpstart's Traffic And First-Time Viewers Make Up 57%

## New And Returning Visitors



Auto shoppers are entering the market every day. With Jumpstart capturing a large volume of them, brands should get their attention as soon as they begin their search.

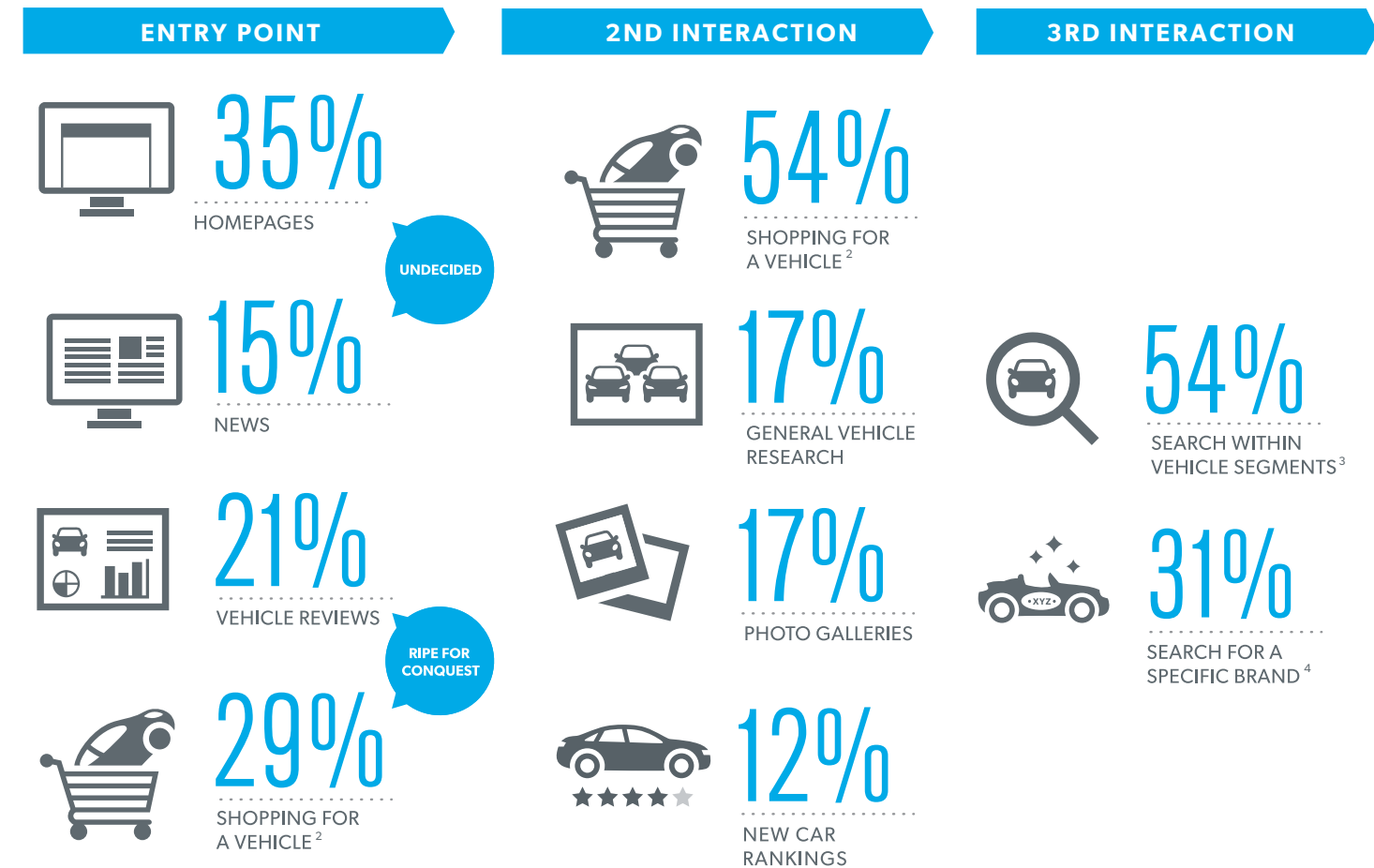
## Traffic Sources



\* Google Analytics, January - December 2013

# Audience Path To Purchase

Of Jumpstart Shoppers, 76% Anticipate Purchasing Or Leasing A Vehicle Within 6 Months Or Less And 81% Are Planning To Spend Up To \$45K On A New Vehicle<sup>1</sup>



\* Google Analytics, January - September 2013

1. Jumpstart Automotive Shopping Series, July 2013

2. Includes vehicle segment pages and make/model pages

3. Includes vehicle segment pages










4. Includes make/model pages



# Change In Share Of Interest

SUV, CUV, And Truck Segments Grow In 2013

## Share Of Interest: Vehicle Segment

Segments	Average Share of Interest	% Increase/Decrease 2012 - 2013
Sedan 	36%	-1%
SUV 	19%	+5%
CUV 	12%	+4%
Sports Car/Convertible 	9%	+1%
Truck 	8%	+15%
Compact/Coupe 	7%	+1%
Wagon 	4%	-13%
Van 	3%	-1%
Alternative Fuel 	2%	-41%

+13%

The sedan segment saw a slight decrease for the second year in a row, primarily driven by non-luxury sedans. Luxury sedan interest increased 13% in 2013.

+26%

After two years of declining interest, the luxury SUV segment experiences an increase, helping contribute to the growth in the SUV segment

\* Jumpstart Internal Analytics, January 2012 - December 2013

# BMW Sees Highest Gains At 24% And Jeep Moves Into The Top 10

BMW's Share Grows Among Top 10 Brands And Jeep's Share Increases 13%

## Share Of Interest: Top 10

RANK	BRAND	2013 SHARE	% INCREASE/DECREASE
1	Ford	13.9%	-1%
2	Chevrolet	9.6%	+1%
3	Toyota	9.2%	+1%
4	Honda	6.8%	-8%
5	Nissan	5.6%	-8%
6	Audi	4.6%	-2%
7	BMW	3.9%	+24%
8	Hyundai	3.5%	-18%
9	Dodge	3.2%	-13%
10	Jeep	3.2%	+13%

\* Jumpstart Internal Analytics, January 2012 - December 2013

# Tesla, Land Rover, And RAM Top The List Of Highest Growth In Share Of Interest

Majority Of Highest Growth In Interest Across All Brands Is In Luxury

## Highest Increase In Interest: Top 10

RANK	BRAND	2013 SHARE	% INCREASE/DECREASE
1	Tesla	0.3%	293%
2	Land Rover	0.9%	151%
3	RAM	0.9%	104%
4	Scion	0.9%	70%
5	Mercedes-Benz	3.0%	42%
6	Jaguar	0.7%	38%
7	Subaru	3.1%	31%
8	Cadillac	2.2%	24%
9	BMW	3.9%	24%
10	Buick	1.4%	22%

+ Turn to page 24 for Jumpstart's complete list of brand share

\* Jumpstart Internal Analytics, January 2012 – December 2013

# Ford Has 5 Of The Top 10 Vehicles For 3<sup>rd</sup> Consecutive Year

Mustang Holds Top Spot For 3 Years In A Row

## 2012: Top 10 Vehicles

RANK	VEHICLE	2012 SHARE
1	Ford Mustang	2.8%
2	Honda Accord	2.0%
3	Ford Escape	1.7%
4	Ford Focus	1.7%
5	Chevrolet Corvette	1.6%
6	Honda Civic	1.6%
7	Ford F-150	1.5%
8	Toyota Camry	1.5%
9	Ford Fusion	1.4%
10	Nissan Altima	1.3%

★ Honda is the only other brand to have more than one vehicle in the Top 10 ★

## 2013: Top 10 Vehicles

RANK	VEHICLE	2013 SHARE
1	Ford Mustang	2.9%
2	Chevrolet Corvette	2.1%
3	Ford F-150	1.9%
4	Honda Accord	1.8%
5	Ford Focus	1.5%
6	Ford Escape	1.5%
7	Honda Civic	1.5%
8	Toyota Camry	1.4%
9	Ford Explorer	1.2%
10	BMW 3-Series	1.2%

★ BMW 3-Series and Ford Explorer new to the list in 2013 ★

\* Jumpstart Internal Analytics, January 2012 – December 2013

# Ford Fiesta, FIAT 500, And Honda Fit Are Top 3 Compacts

After Having A Decrease In Share Of Shopper Interest In 2012, Fiesta Regains Its Top Spot



## Top 10 Compacts

VEHICLE	2012	2013
<b>Ford Fiesta</b>	13.0%	15.3%
<b>FIAT 500</b>	12.1%	15.0%
<b>Honda Fit</b>	15.0%	15.0%
<b>Volkswagen Beetle</b>	7.3%	10.5%
<b>Kia Rio</b>	9.0%	8.3%
<b>Nissan Versa</b>	9.7%	8.2%
<b>Toyota Yaris</b>	7.4%	8.0%
<b>Chevrolet Spark</b>	1.1%	5.9%
<b>Mazda2</b>	2.9%	4.5%
<b>Chevrolet Sonic</b>	5.3%	4.3%

+8%

Toyota Yaris increases after three consecutive years of declining interest

6%

After launching in 2012, Chevrolet Spark already holds an impressive share of compact shopper interest

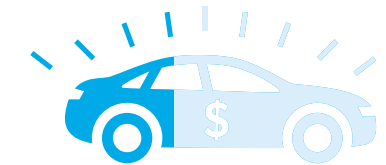
# Luxury Sedan Interest And Unique Visits Up In 2013

Shopper Interest In The Luxury Sedan Segment Sees 14% Growth, And Unique Visits Increase By 27%

68% Share



32% Share



## Top 10 Standard Sedans

VEHICLE	2012	2013
<b>Honda Accord</b>	7.7%	7.3%
<b>Ford Focus</b>	6.4%	6.3%
<b>Honda Civic</b>	6.1%	6.0%
<b>Toyota Camry</b>	5.8%	5.9%
<b>Nissan Altima</b>	5.1%	4.8%
<b>Chevrolet Impala</b>	3.8%	4.8%
<b>Ford Fusion</b>	5.3%	4.6%
<b>Toyota Corolla</b>	3.5%	4.5%
<b>Mazda3</b>	3.5%	4.2%
<b>Chevrolet Malibu</b>	3.9%	3.6%

★ After three years of declining interest, Toyota Corolla experiences the largest increase of all other brands in the compact segment ★

## Top 10 Luxury Sedans

VEHICLE	2012	2013
<b>BMW 3-Series</b>	10.6%	10.4%
<b>Cadillac CTS</b>	6.1%	6.6%
<b>Audi A4</b>	7.6%	6.0%
<b>Audi A6</b>	4.7%	4.9%
<b>Mercedes-Benz E-Class</b>	3.3%	4.8%
<b>BMW 5-Series</b>	4.4%	4.8%
<b>Acura TL</b>	5.6%	4.7%
<b>Mercedes-Benz S-Class</b>	2.1%	3.7%
<b>Cadillac ATS</b>	1.4%	3.5%
<b>Mercedes-Benz C-Class</b>	3.9%	3.2%

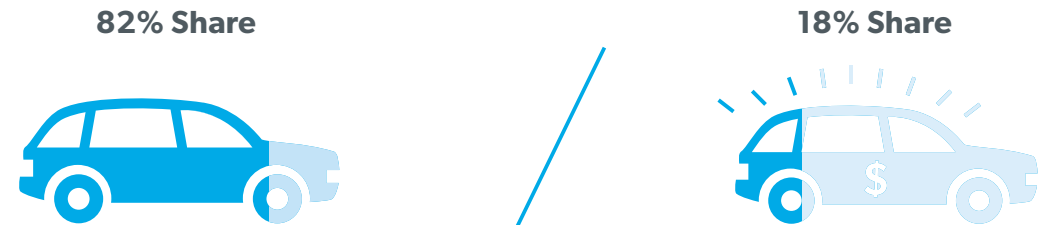
★ Cadillac ATS already in the Top 10 after launching in 2012 ★

\* Jumpstart Internal Analytics, January 2012 – December 2013

\* Jumpstart Internal Analytics, January 2012 – December 2013

# Luxury SUV Increases Its Share Of Total SUV Segment

Land Rover's Range Rover Evoque And Sport Both Move Into Top 10 Luxury SUV



## Top 10 Standard SUVs

VEHICLE	2012	2013
Ford Escape	11.1%	9.8%
Ford Explorer	7.4%	7.8%
Jeep Wrangler	6.5%	7.0%
Toyota Rav4	7.6%	6.5%
Chevrolet Tahoe	3.6%	5.8%
Jeep Grand Cherokee	5.5%	5.7%
Subaru Forester	3.9%	5.7%
Toyota Highlander	4.4%	5.6%
Honda CR-V	4.6%	3.9%
Toyota 4Runner	3.3%	3.9%

## Top 10 Luxury SUVs

VEHICLE	2012	2013
Cadillac Escalade	15.7%	17.2%
Porsche Cayenne	14.0%	14.7%
Range Rover	6.2%	9.8%
Infiniti FX	9.8%	6.9%
Volvo XC90	7.2%	6.8%
Range Rover Evoque	0.0%	6.6%
Lincoln Navigator	5.8%	5.6%
Infiniti QX	5.2%	4.7%
Mercedes-Benz GL	5.1%	4.7%
Range Rover Sport	2.2%	4.5%

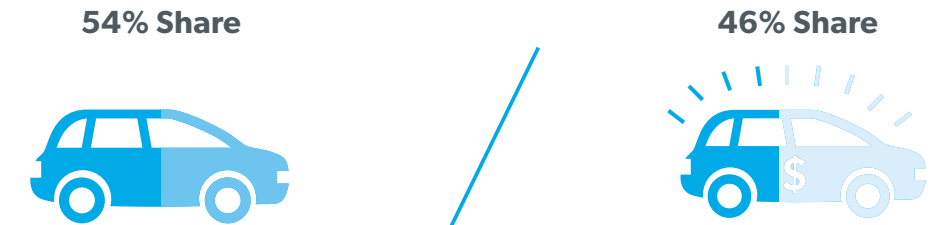
**17%** Cadillac Escalade has highest share of interest in 2013

★ Chevrolet Tahoe enjoys second consecutive year of increased shopper interest ★

\* Jumpstart Internal Analytics, January 2012 – December 2013

# Luxury CUV's Share Of Interest And Unique Visits Up

While Standard CUVs Still Hold Majority Of Shopper Interest, Luxury Sees 20% Increase



## Top 10 Standard CUVs

VEHICLE	2012	2013
Chevrolet Equinox	11.9%	10.9%
Ford Edge	8.7%	9.7%
Hyundai Santa Fe	5.8%	8.7%
Kia Sorento	7.4%	8.3%
Nissan Murano	5.9%	6.8%
Mazda CX-5	4.9%	6.6%
GMC Acadia	5.5%	6.4%
Hyundai Tucson	6.0%	5.3%
Subaru XV Crosstrek	NA	4.4%
Jeep Compass	3.6%	4.2%

**+15%** After three years of declining numbers, Nissan Murano sees interest go up in 2013

## Top 10 Luxury CUVs

VEHICLE	2012	2013
Audi Q5	19.9%	16.0%
Acura MDX	11.6%	12.8%
Buick Enclave	9.7%	9.3%
BMW X5	7.0%	7.0%
Lexus RX	7.7%	6.2%
Audi Q7	5.9%	5.5%
BMW X1	1.7%	5.4%
Cadillac SRX	6.2%	5.2%
Acura RDX	5.9%	5.1%
BMW X3	4.8%	5.0%

**+10%** After having a decrease in share of interest for past three years, MDX interest grows in 2013

\* Jumpstart Internal Analytics, January 2012 – December 2013

# Large Truck Segment Sees Strong Growth

**Ford F-150, Chevrolet Silverado, And Toyota Tundra Are Top 3 Large Trucks Shopped On Jumpstart Sites**



## Top Large Trucks

VEHICLE	2012	2013
<b>Ford F-150</b>	39.1%	38.2%
<b>Chevrolet Silverado</b>	21.3%	17.7%
<b>Toyota Tundra</b>	10.2%	11.3%
<b>GMC Sierra</b>	11.6%	11.2%
<b>RAM 1500<sup>1</sup></b>	3.6%	7.7%
<b>Chevrolet Avalanche</b>	5.5%	5.7%
<b>Nissan Titan</b>	4.4%	4.4%
<b>Honda Ridgeline</b>	4.4%	3.8%

★ **When looking at the complete year-over-year comparison, Toyota Tundra sees largest increase in interest** ★

➕ For more insights on trucks, turn to page 30

\* Jumpstart Internal Analytics, January 2012 – December 2013

1. Reclassification of Dodge RAM to RAM 1500 created data inconsistencies for first half of 2012, therefore only half of 2012 share of truck shopper interest is calculated here

# Share Of Jumpstart Shoppers By Automotive Brand

VEHICLE	CALENDAR YEAR 2011	CALENDAR YEAR 2012	CALENDAR YEAR 2013	% VARIANCE
<b>Ford</b>	13.9%	14.0%	13.9%	-1%
<b>Chevrolet</b>	10.5%	9.5%	9.6%	1%
<b>Toyota</b>	10.1%	9.1%	9.2%	1%
<b>Honda</b>	8.4%	7.4%	6.8%	-8%
<b>Nissan</b>	5.5%	6.1%	5.6%	-8%
<b>Audi</b>	4.0%	4.7%	4.6%	-2%
<b>BMW</b>	2.8%	3.1%	3.9%	24%
<b>Hyundai</b>	5.0%	4.3%	3.5%	-18%
<b>Dodge</b>	3.7%	3.7%	3.2%	-13%
<b>Jeep</b>	2.6%	2.8%	3.2%	13%
<b>Subaru</b>	2.1%	2.4%	3.1%	31%
<b>Volkswagen</b>	3.2%	3.1%	3.0%	-3%
<b>Mercedes-Benz</b>	1.7%	2.1%	3.0%	42%
<b>Mazda</b>	2.7%	2.8%	2.7%	-4%
<b>Kia</b>	3.2%	3.1%	2.6%	-16%
<b>Cadillac</b>	1.4%	1.8%	2.2%	24%
<b>Lexus</b>	1.8%	1.9%	2.2%	18%
<b>Acura</b>	2.1%	1.9%	2.2%	16%
<b>GMC</b>	1.7%	1.8%	1.9%	9%
<b>Porsche</b>	1.2%	1.5%	1.5%	1%
<b>Buick</b>	1.2%	1.2%	1.4%	22%
<b>Infiniti</b>	1.1%	1.1%	1.1%	5%

VEHICLE	CALENDAR YEAR 2011	CALENDAR YEAR 2012	CALENDAR YEAR 2013	% VARIANCE
<b>Volvo</b>	1.3%	1.3%	1.0%	-18%
<b>Lincoln</b>	0.8%	0.9%	1.0%	13%
<b>Scion</b>	0.5%	0.5%	0.9%	70%
<b>Ram</b>	0.4%	0.4%	0.9%	104%
<b>Chrysler</b>	1.2%	1.1%	0.9%	-19%
<b>Land Rover</b>	0.4%	0.3%	0.9%	151%
<b>Mitsubishi</b>	1.5%	1.3%	0.8%	-34%
<b>Mini</b>	0.9%	0.8%	0.8%	-2%
<b>Jaguar</b>	0.5%	0.5%	0.7%	38%
<b>Fiat</b>	0.4%	0.5%	0.6%	13%
<b>Suzuki</b>	0.6%	0.4%	0.3%	-33%
<b>Tesla</b>	0.0%	0.1%	0.3%	293%
<b>SRT</b>	NA	NA	0.2%	NA
<b>Fisker</b>	0.00%	1.0%	0.2%	-83%
<b>Smart</b>	0.1%	0.1%	0.0%	-59%
<b>Grand Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>0%</b>

# Feeling The Love

Jumpstart's TMI Measures Subaru Forester Success



**Libby Murad-Patel**  
Senior Director Strategic Insights

For the past few years, scores of vehicles have flooded the auto market. Consumers are inundated with more choices than ever before and brands are faced with an increasing challenge of not only holding their customers' attention, but also acquiring new ones.

But Subaru is one brand that has managed to stay ahead.

In 2013, Subaru got in front of shoppers during the research process—and got them closer to the point of purchase. The company increased its digital spending last year, dedicating 25% of its marketing budget to digital and social media (up from 15% two years prior) and reported its fifth consecutive year of record-breaking sales—with 60% of buyers new to the brand.

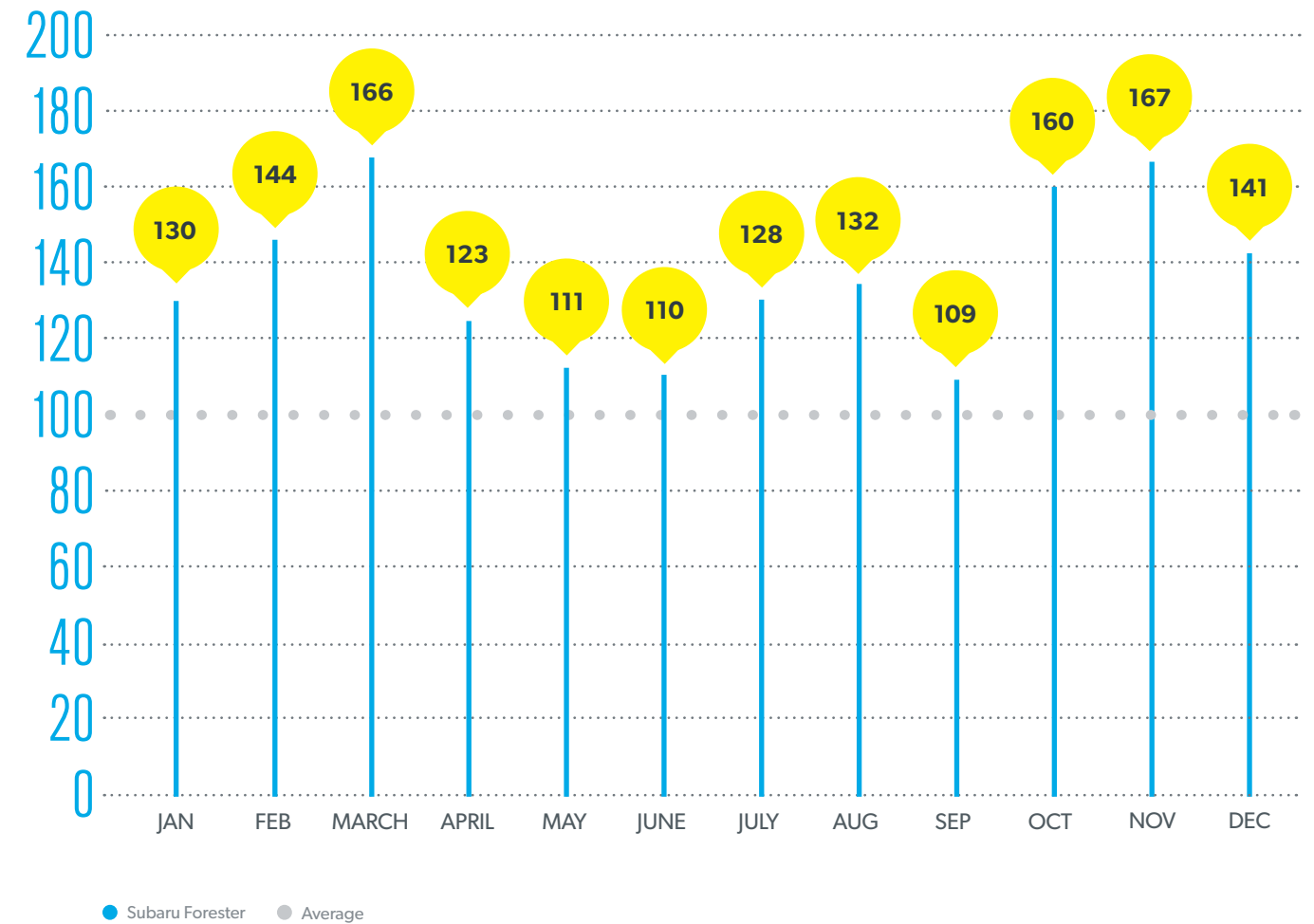
Subaru had particularly great success last year with its 2014 Forester launch. Unveiled in the U.S. at the New York Auto Show in April 2013, the model received plenty of attention from both press and consumers.

With the help of Jumpstart's True Market Impact™ reporting, Subaru was able to determine how the Forester performed with online auto shoppers. By analyzing the shopping behaviors of consumers across Jumpstart's portfolio of automotive sites, Jumpstart was able to monitor the level of engagement and intent that shoppers have for vehicles. Throughout 2013, Jumpstart measured consumer interest in the Forester against its competitors in the CUV and SUV categories and found that its overall TMI index score was above average every month. Forester not only sustained its growth throughout 2013, but also increased its share of SUV shoppers by nearly 50% and ended the year with an almost 6% share of Jumpstart's SUV shoppers, placing it seventh among both small and large SUVs.

And that shopper interest paid off. In January, the company reported that Forester sales were up nearly 62% for the year.

Subaru's TMI scores have aligned with its seasonal spends—revealing a direct correlation between online advertising and consumer interest. After a digital media push (the company increased its digital spending from \$2.5 million to \$4 million) to move sales in the first quarter, Forester's index jumped to 166.

## Subaru Forester Total TMI Scores



## Subaru Forester True Market Index™ Average Scores: 2013

	TOTAL SCORE	CONSIDERATION	BRAND ENGAGEMENT	SHARE OF MARKET	MARKET DEMAND	PURCHASE INTENT
<b>12-Month Average</b>	135	106	108	200	113	121



Subaru is a brand that has experienced wide consumer appeal across nearly every segment they compete in

Forester’s score then peaked in November at 167, the same month that sales increased 135%.

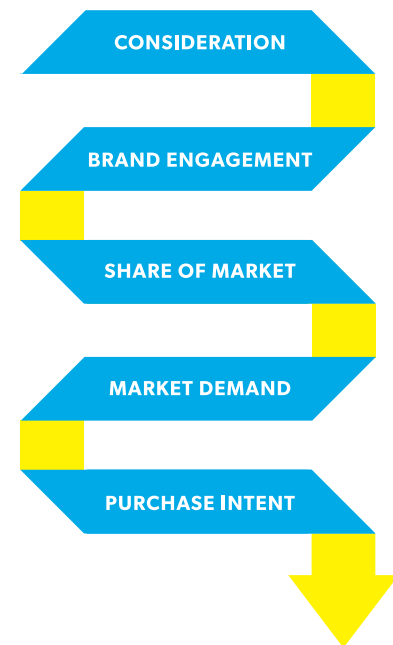
Subaru continues to have widespread consumer appeal in nearly every segment it competes in. Marketing campaigns have resonated deeply with the rational and emotional sides of decision making, and generated a ton of buzz for the brand and its lineup.

So what’s next for Subaru? After producing reliable, no-frill vehicles, the company just released the much-anticipated super performance WRX STI at the North American International Auto Show (NAIAS), a sportier model that speaks directly to the enthusiast. The company is also set to release the XV Crosstrek Hybrid later this year (the standard XV Crosstrek is already one of the Top 10 CUVs shopped on Jumpstart’s sites).

Jumpstart looks forward to helping Subaru and all other auto manufacturers leverage TMI to monitor marketing efforts and the impact on sales. And not only keep customers—but win new ones.

## True Market Impact™

Jumpstart’s TMI score is a snapshot of a brand’s overall health. It’s found by measuring five fundamental marketing metrics, which include:



TRUE MARKET IMPACT™

### Consideration

Volume of unique visitors to make/model pages

### Brand Engagement

Volume of page views on make/model pages

### Share of Market

The visitor’s content journey

- >> Cross-shopping: Starting with the brand’s model then viewing competitive models
- >> Reverse cross-shopping: Starting with competitive models then viewing the brand’s model

### Market Demand

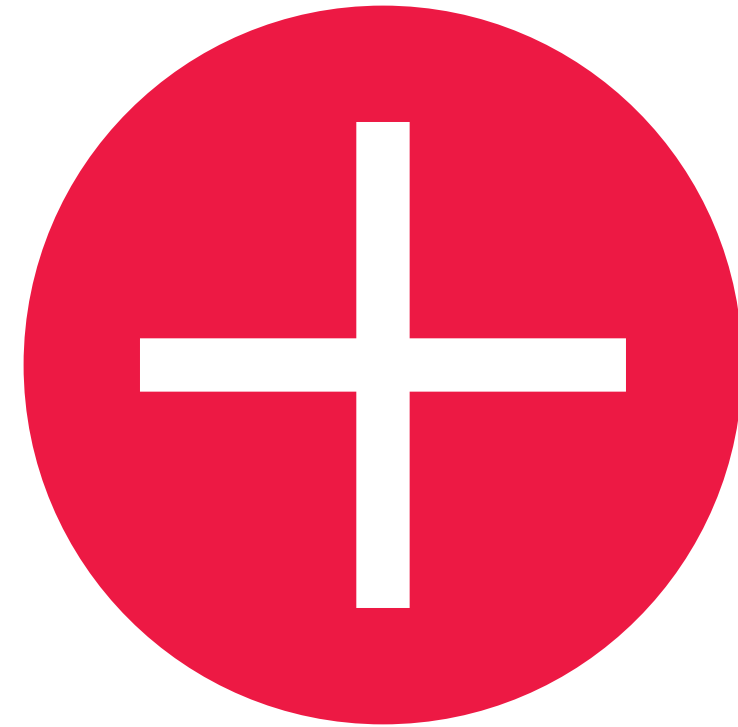
Share of unique visitors within a vehicle segment

### Purchase Intent

Share of “Request a Quote” leads for a specific make/model

All data is based on a rolling three-month average, leveraging internal audience metrics and lead submissions.

Get More Insights—Visit [jagurl.com/moreinsights](http://jagurl.com/moreinsights)



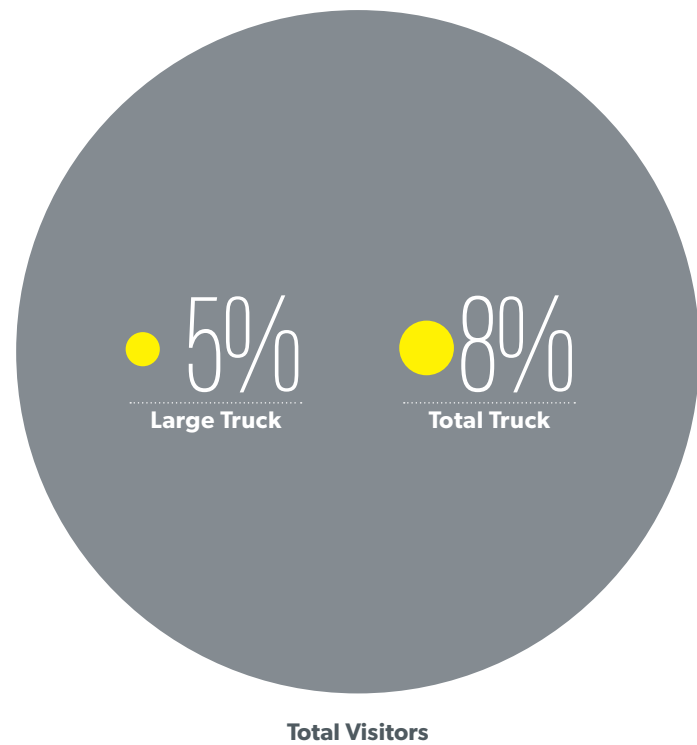
The first 25 people to tweet their favorite article or stat in this book win a Jumpstart auto trivia poster. #JAGinsights @JumpstartAuto



# Large And In Charge

It was a banner year for trucks, thanks to strong interest in large models—which accounted for three of the Top 5 vehicles sold in the U.S. last year. After publishing a complete report in July, Jumpstart takes another look at this popular segment.

## Jumpstart's Audience

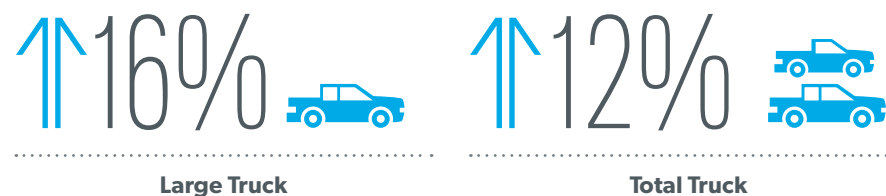


## Visitor Volume – Large Trucks



In 2013, there were 43% more large truck shoppers on Jumpstart's portfolio of sites

## Sales Growth 2012 – 2013



## Top 5 Large Trucks Shopped In 2013

- 1**

<b>FORD</b>	
<b>F-150</b>	
2012	<b>39%</b>
2013	<b>38%</b>

⇒ While the best-selling F-150 still enjoys the majority of shopper interest in the large truck segment, competition has been slowly moving in
- 2**

<b>CHEVROLET</b>	
<b>Silverado</b>	
2012	<b>21%</b>
2013	<b>18%</b>

⇒ The Silverado may have ended the year down more than three percentage points in Jumpstart shopper interest, but after winning the North American Truck of the Year Award at NAIAS, Jumpstart is expecting to see its numbers pick back up
- 3**

<b>TOYOTA</b>	
<b>Tundra</b>	
2012	<b>10%</b>
2013	<b>11%</b>

⇒ After unveiling its 2014 model at last year's Chicago Auto Show (including a version targeted toward luxury buyers), Toyota enjoys an immediate boost in interest and finishes the year slightly ahead of the year prior
- 4**

<b>GMC</b>	
<b>Sierra</b>	
2012	<b>12%</b>
2013	<b>11%</b>

⇒ Despite ending 2013 one percentage point down in share of interest, Sierra has been enjoying a steady swell since November 2013
- 5**

<b>RAM</b>	
<b>1500</b>	
2012	<b>4%</b>
2013	<b>8%</b>

⇒ The "pickup truck for every job" has the greatest increase in interest in 2013, more than doubling its share of shopper interest

+ To read more about the 2013 truck comeback, visit: [jagurl.com/pickuptrucks](http://jagurl.com/pickuptrucks)

\* Jumpstart Internal Analytics, January 2012 – December 2013

# Luxury, Without The Price

**It used to be that when we talked about entry-level luxury, there were just a handful of brands that were part of the conversation. Well, not so much anymore.**

In last year's Insights book, Jumpstart predicted there would be an "entry-level explosion." And based on our 2013 shopping numbers, it looks like we were right.

We found that Acura had a 16% increase in share of shopper interest this year, a

growth partly due to the popularity of its entry-level ILX, which has had a 74% surge in interest since launching in 2012.

The face of entry-level luxury is changing. The traditional luxury brands are becoming more accessible by offering lower-priced options. And manufacturers known for affordability (like Hyundai and Kia) are now offering more in the way of luxury.

The aspirational brands—which have historically dominated the luxury market—continue to add more entry-level models in hopes of luring young shoppers. BMW has the 1 Series starting at \$31,500, and Audi just released its all-new A3 sedan for around \$30K (Audi promoted the A3 during the 2014 Super Bowl).



Image Source: mbusa.com

"Just because we're moving to a new price point doesn't mean we're diluting. It just means we're opening up the brand."<sup>1</sup>

**Stephen Cannon**  
President and CEO,  
Mercedes-Benz USA

1. Bloomberg.com: Audi, Mercedes Seek to Lure Mainstream With Cheaper Cars, January 2014

The Mercedes-Benz CLA-Class (under \$30K) has sold very well, helping usher in a younger buyer to the Mercedes brand who, perhaps more importantly, may be apt to trade up the road.

Cadillac announced that October had marked its 17th consecutive month of increased sales, led, in large part, by its ATS. Jumpstart has seen a 144% increase in shopper interest since the vehicle launched in 2012, making it one of the Top 10 luxury vehicles (a category that includes more than 40 vehicles) shopped on Jumpstart's sites.

Kia, a company that's been praised for having the lowest cost of ownership, has pulled into premium with its sleekly designed Cadenza. Despite being new to the U.S. market in 2013, this full-size luxury vehicle attracted more than 20,000 shoppers per month on Jumpstart's sites, allowing Kia to move in on competitors like the Hyundai Equus and the Acura ILX.

"The auto manufacturers are simply responding to the younger demographic, an audience that is looking for luxury, but not the price tag that often comes with it," explains Senior Director of Strategic Insights, Libby Murad-Patel.

So far, this approach appears to be paying off. Cadillac spokesperson, David Caldwell, told *Automotive News* in August that its ATS was bringing in the younger customers with 74% of ATS buyers new to the brand and 20% under the age of 35.

There have been questions around whether this strategy dilutes brands. Only time will tell. But at the end of the day, what matters is the customer and whoever wins their loyalty—no matter how they do it—wins.

# 21%

**of auto shoppers are considering a luxury brand as their top choice for their next vehicle purchase<sup>2</sup>**

2. Jumpstart Automotive Shopping Series, July 2013

## Price of Entry (MSRP)



# Auto Shopping In The USA

## Features, Safety, Color, Performance, And Body Styles, By Region

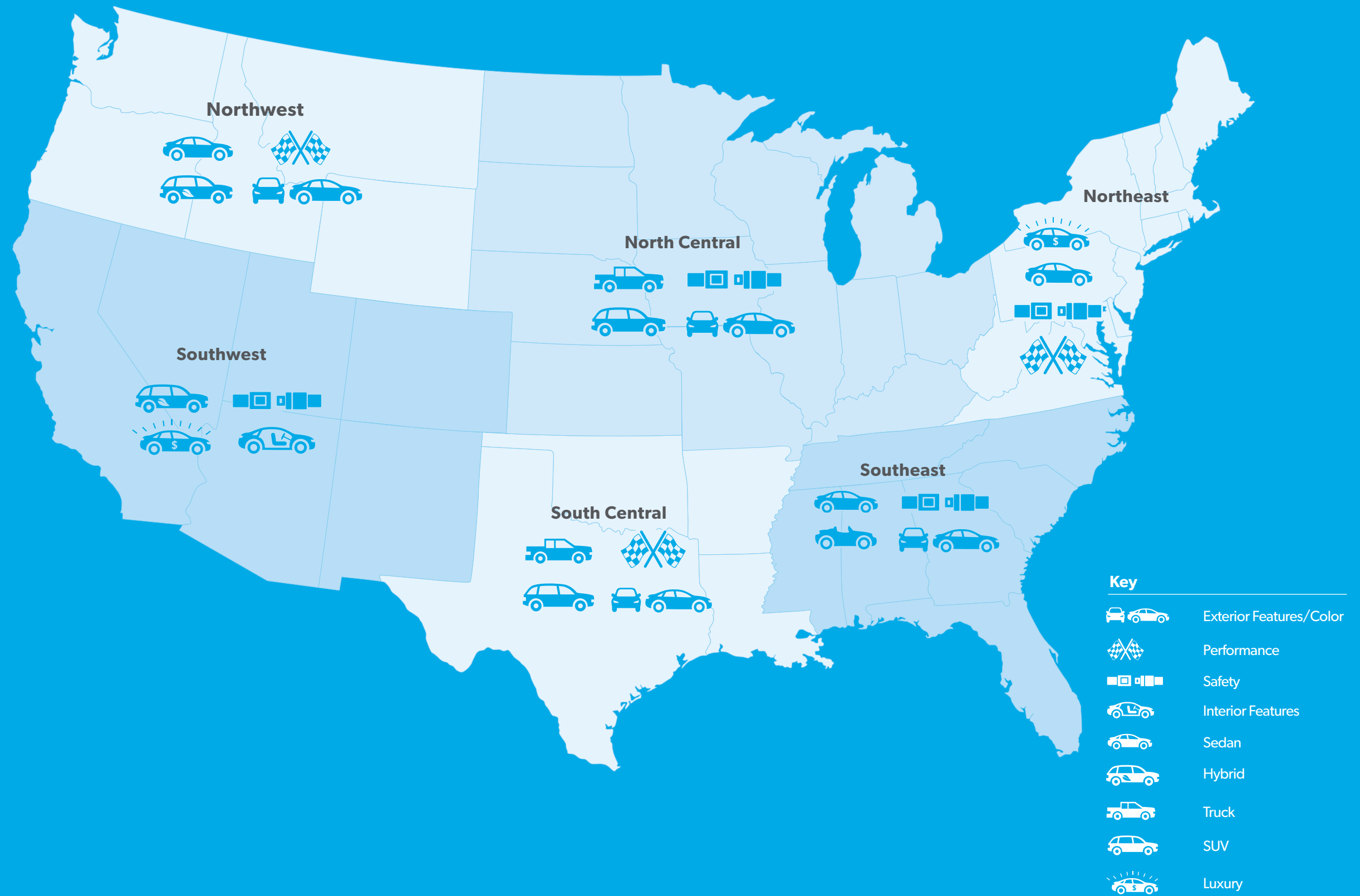
Each year, Jumpstart takes a look at what people shop for in each region. In 2013, Jumpstart found that—outside general vehicle specifications—people consistently compare fuel efficiency and pricing, and view photos across all regions. However, shoppers are also researching features, safety, color, performance, and body styles.

## There Are Always Surprises

Jumpstart knows that online shoppers in the Northeast shop for sedans and luxury vehicles, and that people in some of the colder states (North Dakota, Minnesota) look at trucks and SUVs. But it was surprising to find that the North Central also had the highest percentage of hybrid and sports car shoppers per capita.

The South Central region (where Texas makes up a majority of the population) primarily shops for trucks and SUVs, which comes as no surprise as the state's economy is heavily reliant on fuel production and farming—and thus—heavy duty hauling.

However, Jumpstart did not expect this region to also be home to the highest number of compact shoppers.



# The Wow Effect

Tips For Creating Ads That Get Action

## Increase Click-Through

1

Keep messaging clear and succinct and remember to consider the amount of space you're working with—especially for mobile

2

Draft straightforward, simple CTAs that communicate the action you want the viewer to take

3

Lead the viewer with motion or animation to establish a hierarchy and be sure to always end with a complete message and a product image

## Increase Interaction

4

Give the viewer more to engage with, such as image and video galleries, or a quiz

5

Posing a question is a good way to draw attention and encourage the viewer to take action

6

For mobile, be sure to fully describe the action the viewer is being asked to take ("Tap for Video," "Tap to Expand")

+ visit [jagurl.com/BestPractice](http://jagurl.com/BestPractice)

# Backing It Up

**Jumpstart and PointRoll partnered with dealer groups, Walser Automotive Group and Del Grande Dealer Group, to compare consumer interaction between mobile rich-media and static ads. Here's what they found.**

## The Details

- » Campaign Dates: November 25, 2013 – December 31, 2013
- » Rotation of rich-media and static ads ran across paid mobile media placements during the test period for both dealer groups in their respective markets
- » To find interaction rates, the results (clicks and activities) were measured against the volume of impressions each ad delivered

## The Results

### Static Ads

Both static ads provided simple and succinct messaging with the dealer group name, styling, and reference to inventory and pricing. The call-to-action *See Our Inventory* proved effective in immediately taking the consumer to the dealer group website to further research related automotive brands and dealership locations, yielding a .07% click-through rate against all mobile ad impressions served in respective markets.

This performance was in-line with local or regional performance across mobile, as benchmarked by PointRoll.

With a static ad, the click of the CTA is the only measure of interaction, so the goal is to drive the consumer to a site where they can gather more information.

### Rich-Media Ads

The rich-media ads allowed for a complete shopping experience within the unit, therefore keeping the consumer more engaged. Brand selection, zip code entry, and dealer locator (both map and list views) all encouraged the consumer to gather shopping information in one place, and limit the need to click through to a site.

As a result, these units drove higher engagement:

- » Average interaction rate (interactions per impression) of 0.13%
- » Average interaction time (seconds) of 52.14 (nearly 3x the benchmark interaction time PointRoll cites as an average across all industries and site types)
- » Actions per click of 17.73—signifying the consumer that clicked through was highly engaged, having already performed nearly 18 activities within the unit before clicking through to look at a particular dealership's inventory

\* Static ads were designed and served by Jumpstart. Rich-media ads were designed by Jumpstart and built and served by PointRoll



## The Bottom Line

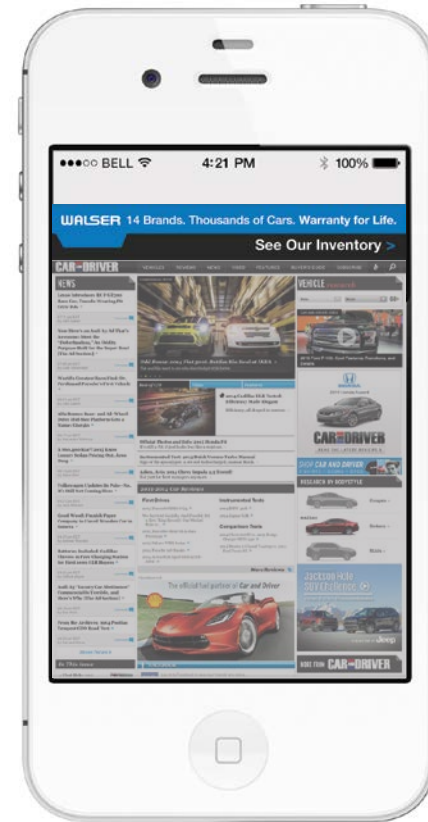
### Static Ads Drive Click-Through, And...

- » allow limited visitor experience, but one clear call-to-action
- » give brands higher click-through-rates, although visitor engagement on the destination site is unknown

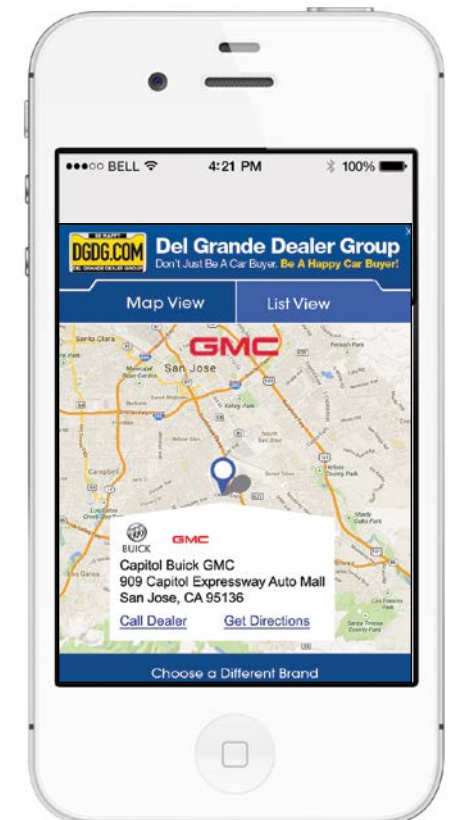
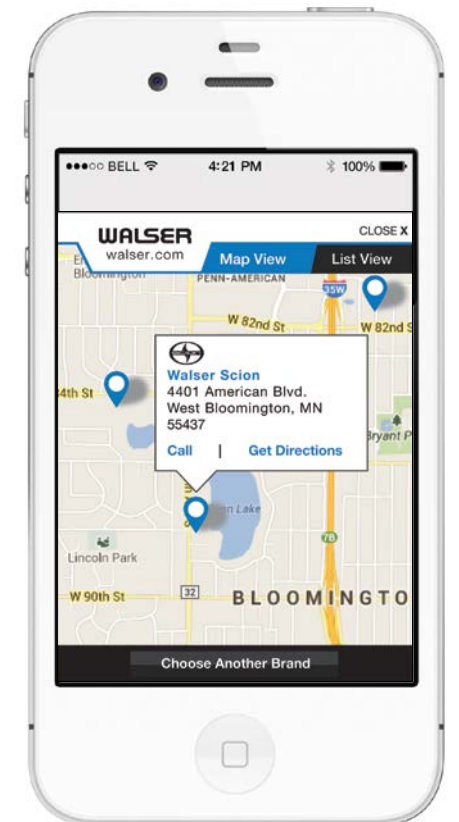
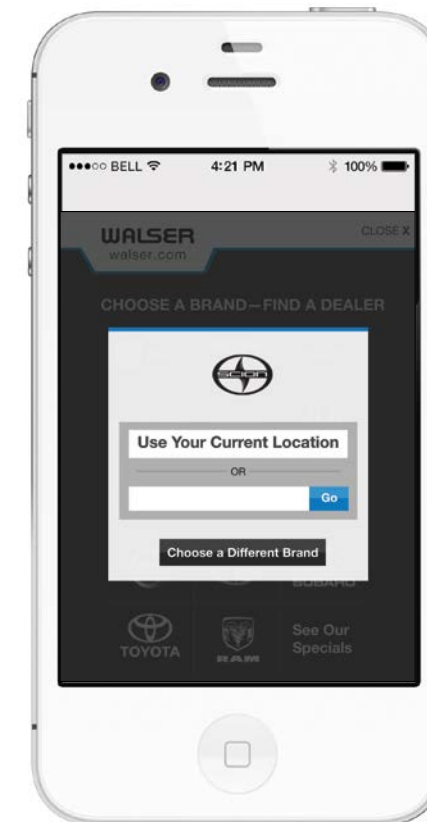
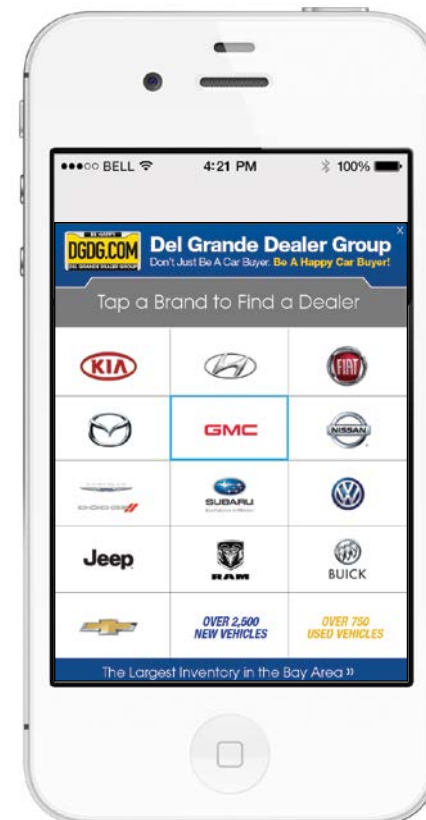
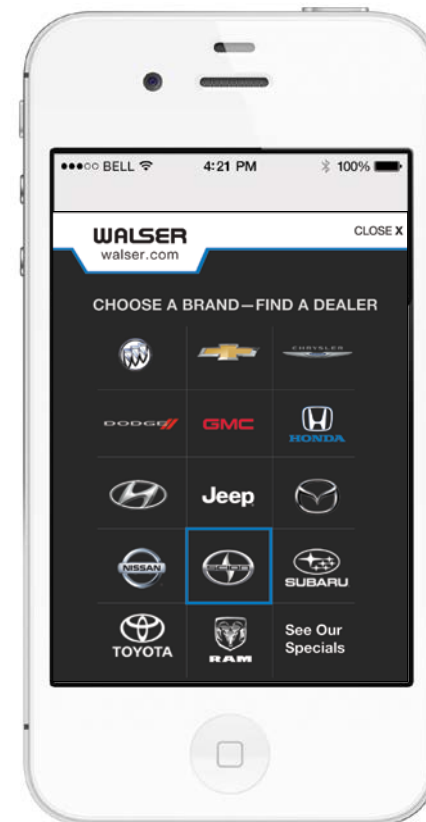
### Rich-Media Ads Drive Engagement, And...

- » capture visitors' attention and encourage them to interact with the brand immediately and enables visitors to get the information they want without leaving the site they're on

## Static Ads



## Rich-Media Ads

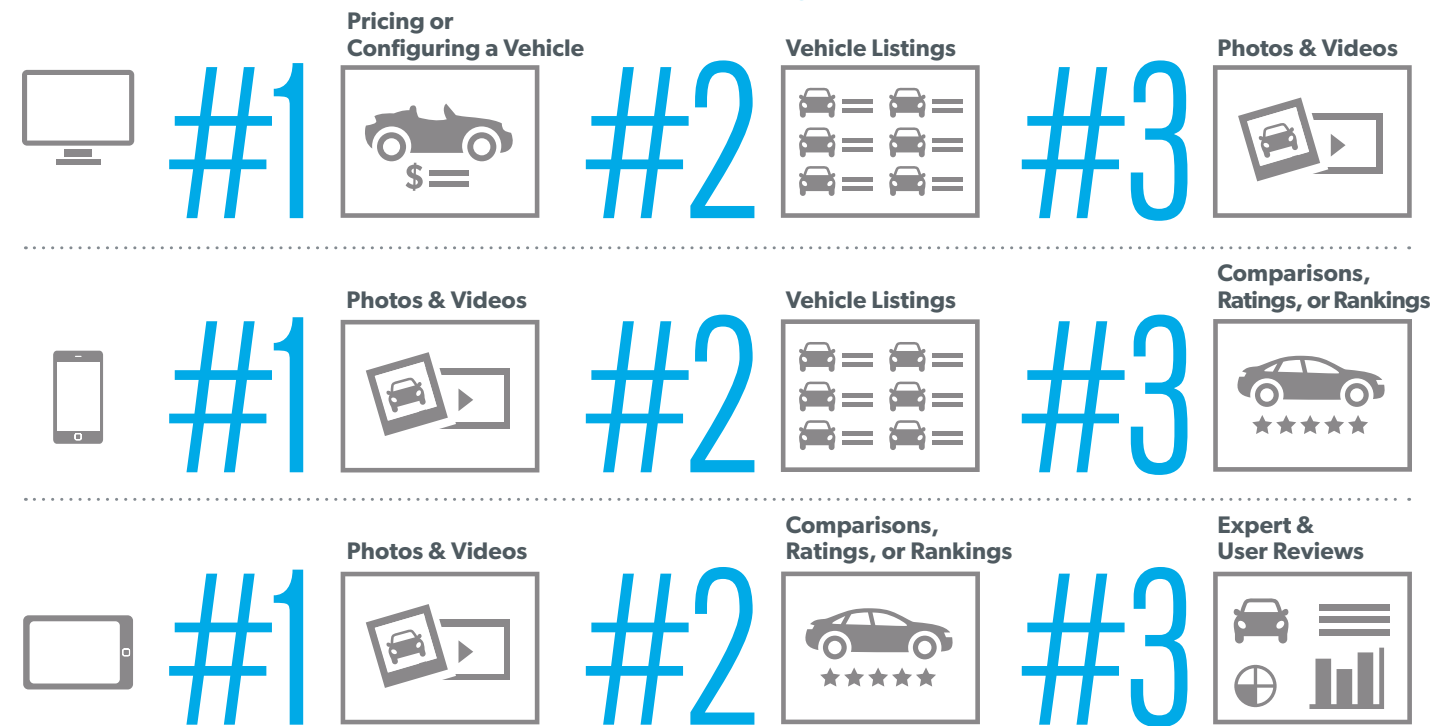


# Smartphones On The Lot And Leads From Laptops

Highlights From Jumpstart's 2013 Shopping Series



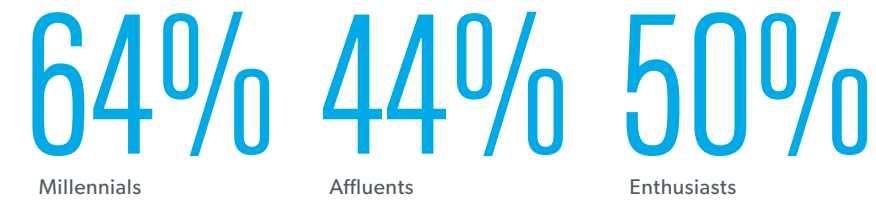
## Most Popular Content Shoppers Are Viewing



★ Jumpstart finds that 76% of in-market auto shoppers surveyed are using a smartphone or a tablet while researching a vehicle and 45% look up information on a mobile device while they are at a dealership ★

## Actions Shoppers Are Taking From Smartphones

Looking up Vehicle Information While at a Dealership or on a Lot



Request a Quote Leads Are Coming From a Desktop or a Laptop



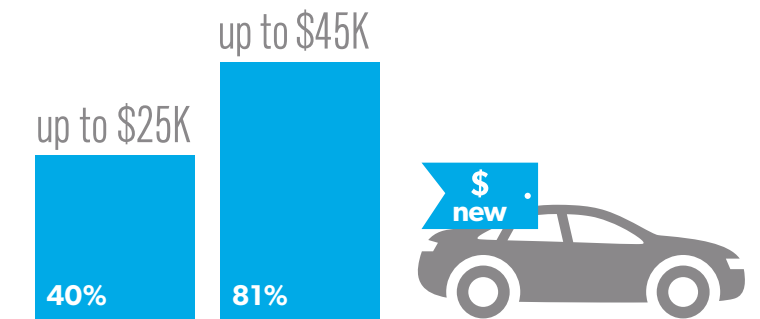
## Top 3 Influencing Factors

Total Audience

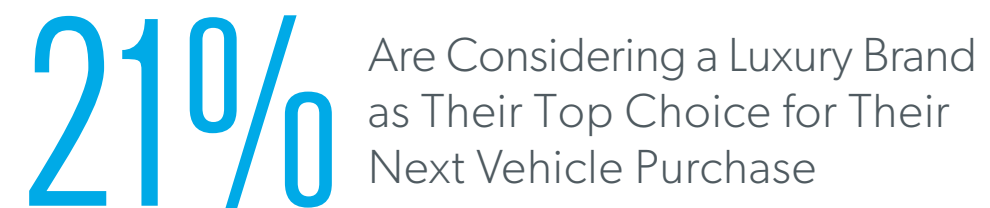
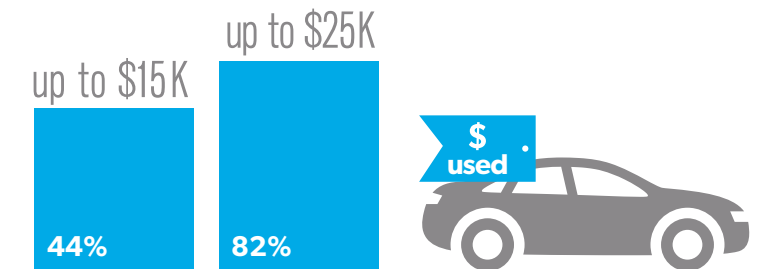


## How Much Shoppers Are Planning to Spend

Buying New



Buying Used



➤ To read the entire survey, visit [jagurl.com/2013survey](http://jagurl.com/2013survey)



# Looking Ahead

Jumpstart's Predictions  
On What's In Store For 2014

## Luxury Is Redefined

In 2014, this segment will grow both in shopper interest and the number of vehicles that are classified in the category (Check out "Luxury, Without the Price" on page 32 for more on this.). Competition is heating up among brands such as Mercedes-Benz and BMW. These two luxury leaders are looking to grab share back from Audi—especially in luxury sedans and CUVs. Land Rover and Porsche continue to pull in a higher share of the luxury SUV segment, but will face more competition once the redesigned Cadillac Escalade launches later this spring.

## Trucks Stay Strong

Large trucks rule the road right now, but if General Motors reveals its two anticipated small trucks under the Chevrolet and GMC badges Jumpstart expects that small truck growth could possibly outpace large trucks in 2014. Read "Large And In Charge" on page 20 and learn how the competition shaped up last year.

## Compacts Make A Comeback

The compact segment, which has already had some momentum in 2013, promises to see a competitive year ahead with some of its top players. With new production estimates quadrupling the number of available Honda Fits later this year, Ford Fiesta could get bumped out of top spot in share of compact interest. The FIAT 500 may also prove to be a worthy adversary. And Volkswagen Beetle and Mazda2 upcoming redesigns are likely to shake up competition (both had a 44 – 54% increase in share from 2012).

➤ Stay up-to-date on all Jumpstart news, visit [jagurl.com/moreinsights](http://jagurl.com/moreinsights)



Image Source: mbusa.com



Image Source: chevrolet.com



Image Source: vw.com



# More Insights

The Best of Jumpstart's 2013 Reporting





# Make Way For The Pickup Truck: The Big Guys Still Lead, But The Small Guys Are Not Far Behind

Thanks to a construction boom and steady gas prices, pickup trucks—large and small—are in the spotlight

Consumer interest for large pickup trucks continues to surge and is showing no sign of slowing down. Large pickup trucks had a 23% increase in interest in the first five months of 2013 (January – May) across Jumpstart Automotive Group’s portfolio of sites.

Increase in consumer interest for the F-150 (or F-Series), which has been the best-selling truck in the U.S. for 36 years and the best-selling vehicle for 31 years, has experienced an increase in consumer interest primarily from domestic SUV and sedan shoppers. In July, Ford reported that F-Series sales were up 24%—making June the best sales month for F-Series since 2005.

It’s not just Ford either. *The Wall Street Journal* reported on July 2, 2013, “Ford, GM, and Chrysler combined sold 157,480 large pickup trucks in June, 26% more than a year ago.”

The big guys might be ahead, but the small guys are moving up fast.

In comparing the percent of shoppers visiting make and model pages in the first five months of 2013 (January – May 2013) to 2012, Jumpstart Automotive Group has seen a 5% increase in online shopper interest in small pickups trucks—the first increase it’s recorded since 2008.<sup>1</sup>

## Large vs. Small: Average Annual Share of Jumpstart Shoppers

BODY STYLE	2008	2009	2010	2011	2012	JAN – MAY 2013	% INCREASE/DECREASE 2012 VS. JAN – MAY 2013
Large	7.6%	6.0%	5.4%	3.8%	4.3%	5.2%	23%
Small	3.8%	3.4%	3.3%	2.4%	2.3%	2.4%	5%

<sup>1</sup>. Share of shopping (increases and decreases in consumer interest) was found by comparing the percent of people visiting make and model pages in the first five months of 2013 (January – May 2013) with those from 2012.

In its [2012 Insights review](#), Jumpstart reported that the Pickup Truck segment (including both small and large) had a 6.1% increase in interest, all of which came from large pickup trucks.

Small pickup trucks experienced a decrease in interest across Jumpstart’s sites last year. But if this enthusiasm keeps up (and experts expect it will), increased sales for small pickup trucks could be just around the corner. As Toyota’s National Fleet marketing mobility and strategic planning manager, Mark Oldenberg, told *pickuptrucks.com* in February, “There are many buyers who believe small trucks better serve their needs.” They do not need a larger truck and they like the fuel economy provided by small trucks.”

Whether it’s for basic towing ability or heavy duty hauling, this interest can be traced directly to today’s strong real estate market. In April, the *Wall Street Journal* reported that home prices across the country were up 9.3%—“the highest annual gain since 2006.” The National Association of Home Builders also reported that 263 U.S. housing markets made improvements in May. And there has been a pent-up demand for new pickup trucks. As Jumpstart’s data illustrates, consumers were, in fact, visiting pickup truck pages throughout the recession. Today, they’re not just looking, they are buying. In its June 2013 sales report, *WardsAuto* reported that large pickup trucks sales increased by 23.6% in May.

Now that the economy is in better shape, construction companies have the confidence and the business—new residential and commercial developments, renovations, improvements, and overall expansion—to finally make the purchase. While gas prices are expected to go up for the summer traveling months, the national average has been stable.

Aside from new construction and steady gas prices, oil and construction companies are buying pickup trucks to support business and—more simply—to replace aging fleets. According to a June 3, 2013 *YahooFinance* article, small business owners are restocking their fleets, buying one to four new models.

### The Players

So far, Toyota has pretty much owned the small pickup truck market with its Tacoma, which currently holds a 33% share of small pickup consumer interest—a 16% increase from 2012. The Tacoma has dominated interest across Jumpstart’s sites from 2012 through May 2013. The automaker also recently unveiled its 2014 Tundra at the Chicago [Auto Show](#), which included a version targeted toward luxury buyers, a first for Toyota.

Aside from new construction and low gas prices, oil and construction companies are buying pickup trucks to support business and more simply—to replace older aging fleets



image source: autotribute.com

While Nissan hasn't had the same level of success with its Frontier as Toyota has had with the Tacoma, it has managed to move up one spot on Jumpstart's list to number three, passing up the Dodge Dakota.

Before Fred Diaz, president and chief executive officer of Ram Truck brand, left Chrysler for Nissan in April 2013, he told *Allpar.com* "You've seen Ford get out of that [small pickup trucks] market; Chevy's gotten out of that market; we've gotten out of that market. So it's basically Toyota and Nissan that have that market all to themselves right now."

## Little Trucks Seeing Big Gains

MAKE	MODEL	2012 SHARE OF SHOPPERS	JAN-MAY 2013 SHARE OF SHOPPERS	% INCREASE/DECREASE 2012 VS. JAN - MAY 2013
Toyota	Tacoma	28%	33%	16%
Ford	Ranger <sup>2</sup>	19%	20%	5%
Nissan	Frontier	15%	15%	2%
Chevrolet	Colorado	12%	14%	17%
Dodge	Dakota	21%	13%	-36%
GMC	Canyon	4%	5%	16%
Suzuki	Equator	.54%	.14%	-75%
Mitsubishi	Raider	.46%	—	—

### Make Room for the Competition

Several manufacturers are entertaining the thought of getting into (or back into) the small pickup truck market. Currently, General Motors is making the most noise as they prepare to launch the second-generation GMC Canyon and Chevrolet Colorado. The GMC Canyon gained notoriety in 2010 when Republican senator Scott Brown used it as a symbol of his hard-working ways in campaign commercials and public appearances. *Reuters* reported that Brown drove up to his victory party in his 2005 GMC Canyon and announced, "I'm Scott Brown. I'm from Wrentham. I drive a truck. And I'm nobody's senator but yours."

1. Share of shopping was measured by looking at the percent of people visiting a brand's make/model page then comparing that number to the total number of visitor's across Jumpstart's portfolio of sites.

2. While Rangers are no longer in production, Jumpstart still measures the last models shopped across its portfolio of sites.

While GM is still pondering calling the trucks "Canyon" and "Colorado", these vehicles are slated to go on sale late next year. According to General Motors' North American President, Mark Reuss, the Colorado will be targeted toward lifestyle buyers, while the Canyon will marketed as more of a work truck.

Despite production of both the Chevrolet Colorado and the GMC Canyon ending in 2012, the compact trucks enjoyed a 17% and 16% increase in interest, respectively.

Hyundai is also considering entering the small pickup market for the first time, as dealers from around the U.S. have been urging the automaker to add a pickup truck to their line-up. Hyundai's Sales Chief, Lee In-Cheol, recently told *Automotive News* "We are studying that one very hard—what kind of pickup truck we should produce, if we have to. Is it a big-size pickup truck like in the United States or a small kind of pickup truck?"

It's still unclear whether Ford will enter the race. Ford's chief operating officer, Mark Fields told *theDetroitBureau.com* in February 2013, that the automaker has "not completely abandoned the idea of playing in the smaller pickup segment—if it can come up with an acceptable business case." Ford ended production of its Ranger in December 2011 (Pest-control company, Orkin, purchased the last North-American built model).

### How it May Play Out

General Motors will no doubt be kicking its small pickup truck marketing plans into high gear in 2014 with the second-generation Chevrolet Colorado and GMC Canyon.

But a few questions remain. Will Ford decide to try its hand at the small pickup truck game? Will Millennials, who are very budget and fuel conscious, be drawn to the allure of a compact truck? And more importantly, will the Toyota Tacoma be able hold its top spot as the big three get back into the game? ●

**General Motors will no doubt be kicking its small pickup truck marketing plans into high gear in 2014 with the second-generation Chevrolet Colorado and GMC Canyon**



image source: latimes.com

# Full-Size Trucks, Suvs, Green Vehicles, And A Little Bit Of Everything Else In Between

While the greatest increases in consumer interest came from the Truck, SUV, and Alternative Fuel categories, there was enthusiasm spread across all segments at the 2012 – 2013 U.S. auto shows

At the Los Angeles show, the Chevrolet Spark EV gained a 94% increase in share of Jumpstart shoppers. Toyota showcased its redesigned Tundra at the Chicago auto show and grabbed an 80% increase in interest.

The Range Rover Sport experienced a 94% increase during the New York auto show, proving Daniel Craig’s Manhattan road trip to be a huge success. And despite the adulation the Corvette Stingray received, it came second to the 2014 Jeep Patriot, which wound up having the greatest increase (73%) at the Detroit auto show (NAIAS).

The Jeep brand was a total hit with consumers, experiencing increased shopper traffic to multiple vehicles during and after the show. Jeep Compass had a 30% increase and Jeep Grand Cherokee had an 18% increase. Out of 34 vehicles Jumpstart analyzed at NAIAS, Jeep had three of the Top 15 vehicles that gained shopper interest.

## Driving the Traffic

Los Angeles and Detroit (NAIAS) continued to energize overall enthusiasm across Jumpstart’s portfolio while New York and Chicago (the largest and longest running of all four shows) drove attention to specific vehicles. The Detroit auto show grabbed the most attention with a 21% increase in unique visitor volume—a 97% increase from 2012.

## The Top 5 That Generated the Most Consumer Interest Overall

THE VEHICLE	THE BIG DEAL	THE CITY	INCREASE IN SHARE OF SHOPPERS
Chevrolet Spark	EV Unveiling	Los Angeles	94%
Land Rover Range Rover Sport	2014 Unveiling	New York	94%
Ford Fiesta	ST Unveiling	Los Angeles	86%
Jaguar XK	XKR-S GT Unveiling	New York	86%
Toyota Tundra	2014 Unveiling	Chicago	80%

Jumpstart Automotive Group looked at key vehicles (primarily award winners, concept cars, and debuts) to determine which brands captured the most attention.

## Los Angeles Auto Show

When: **November 28, 2012–December 9, 2012**  
 Vehicle Unveilings: **24**  
 North American Debuts: **21**

Always a popular event for showcasing green vehicles, the Los Angeles show again featured a bevy of Compacts and Electrics. And the top performer for 2012–2013 was the Chevrolet Spark EV. With a MyLink infotainment system that includes a seven-inch touch screen integrated with third-party apps such as Siri Eyes Free and Pandora and the ability to get an 80% battery charge in 20 minutes (feature comes with the optional DC Fast Charge system), this little car packs quite a punch.

The Ford Fiesta ST had the second highest increase at 86%. The company expects this super-charged compact to go neck and neck with the FIAT 500 Abarth and the MINI JCW.

Rounding out the Top 3 was the FIAT 500, which had an increase of 55%. The introduction of the 500E (Electric) and 500L (4-Door) and Trekking version, and the North American debut of the Abarth Cabriolet, fueled curiosity for the 500.

Here’s a closer look at the vehicles that maintained consumer consideration after the hype of the events faded.

## Los Angeles Top 5

THE VEHICLE	THE BIG DEAL	INCREASE IN SHARE OF SHOPPERS
Chevrolet Spark	EV Unveiling	94%
Ford Fiesta	ST Unveiling	86%
FIAT 500	Electric & 500L Trekking Unveiling	55%
Kia Sorento	North American Debut	44%
Audi A6	TDI Clean Diesel North American Debut	41%

## More Top Performers

THE VEHICLE	THE BIG DEAL	INCREASE IN SHARE OF SHOPPERS
Mitsubishi Outlander	2014 North American Debut	35%
Toyota RAV4	2014 Unveiling	31%
Kia Forte	2014 Sedan Unveiling	30%
Jaguar F-Type	F-Type and XFR-S North American Debut	28%
Honda Civic	2014 Civic, Hybrid & Si Unveiling	23%
Mazda 6	2014 North American Debut	22%

## Detroit (North American International) Auto Show

When: **January 14, 2013 – January 27, 2013**

Vehicle Unveilings: **45**

North American Debuts: **10**

Concept Cars: **16**

The North American International Auto Show (NAIAS) in Detroit revealed a broad mix of vehicles—from award winners and concepts to production vehicles—that sustained consumer interest and a healthy amount of press.

Chevrolet Corvette had the second-highest increase in shopper interest at 48%. The highly anticipated unveiling of the Corvette C7 Stingray won high praise from consumers and critics throughout the show who hadn't seen the Stingray in four generations. But perhaps due to the aspirational nature of the Corvette and delayed availability, shopper interest tapered off after the show.

Although the redesigned 2014 Lexus IS received a fair amount of criticism for specific design elements, it held onto consumer attention with a 37% increase in share of Jumpstart shoppers following the show. Acura MDX had a 33% increase, largely thanks to the introduction of its 2014 MDX prototype. The MDX concept drove more traffic to Jumpstart sites than any other concept vehicle at NAIAS.

Ram 1500 saw significant growth in shopper interest at 34% after being named the North American Truck of the Year, a prestigious award that is designated by a panel of 49 automotive journalists throughout the U.S. and Canada and scores vehicles on various design and engineering factors. The same panel gave the Cadillac ATS the North American Car of the Year award, however ATS only held a 10% increase over the same time period.

## Detroit Top 5

THE VEHICLE	THE BIG DEAL	INCREASE IN SHARE OF SHOPPERS
Jeep Patriot	2014 Redesign Unveiling	73%
Chevrolet Corvette	2014 Unveiling—Corvette Stingray	48%
Lexus IS	2014 Unveiling	37%
Ram 1500	Truck of the Year Award Winner	34%
Acura MDX	2014 Prototype MDX Reveal	33%

## More Top Performers

THE VEHICLE	THE BIG DEAL	INCREASE IN SHARE OF SHOPPERS
Jeep Compass	2014 Unveiling	30%
Smart Forstars	North American Debut	25%
Dodge Dart	Dart GT Unveiling	22%
Acura NSX	NSX Concept	19%
Lincoln MKC	MKC Concept	18%
Jeep Grand Cherokee	2014 Unveiling, Diesel and SRT editions	18%
Nissan Versa	2014 Unveiling Versa Note Hatchback	15%

## Chicago Auto Show

When: **February 7, 2013 – February 18, 2013**

Vehicle Unveilings: **36**

Concept Cars: **18**

## Chicago Top 5

THE VEHICLE	THE BIG DEAL	INCREASE IN SHARE OF SHOPPERS
Toyota Tundra	2014 Unveiling	80%
Chevrolet Cruze	2014 Diesel Unveiling	74%
Nissan JUKE	2014 NISMO Unveiling	54%
Hyundai Elantra	Concept Zombie Survival Edition	14%
BMW Z4	2014 BMW Z4	10%

Showcasing a redesign of its Tundra full-size pickup truck, Toyota enjoyed an immediate lift (80%) in traffic to its vehicle pages on Jumpstart sites. The new "chiseled" look sparked consumer interest and helped Tundra gain rank among competitors such as the Ram 1500, Ford F-150, Chevrolet Silverado, and the redesigned GMC Sierra. The company also introduced two luxury versions of the Tundra—Toyota's first-ever luxury trucks.

Chevrolet Cruze grabbed a 74% increase in shopper interest with the unveiling of its new clean turbo diesel version—the manufacturer's first diesel in the U.S. since the 1986 Chevette. The Cruze, which is positioned as a competitor to the Volkswagen Jetta TDI, should resonate with eco-conscious customers with an estimated 42mpg highway.

Nissan JUKE had the third-highest increase at 54%. Nissan unveiled a NISMO version (Nissan Motorsport) of the JUKE at this year's show and caught the attention of press and consumers alike.

Hyundai Elantra showed off its Zombie Survival Edition (initially unveiled at Comic-Con) complete with a spiked front plow. In a Hyundai USA promotional video, *Walking Dead* creator and writer, Robert Kirkman, explained the vision behind his concept, "I don't know a lot about cars, but I do know a lot about the zombie apocalypse and what I would like to have to survive."

BMW re-debuted its BMW Z4 in Chicago, after originally presenting it at the NAIAS. The Z4 saw an increase of 10% during the show.

Kia was another brand that had notable audience growth (13%) thanks, in part, to the excitement around the premier of its Superman-inspired Kia Optima Hybrid. The hybrid is the sixth vehicle in a 10-month, eight-vehicle partnership between Kia and DC Entertainment to help bring awareness to DC's "We Can Be Heroes" campaign, an effort to help the famine and drought-stricken Horn of Africa.



## New York Auto Show

When: **March 27, 2013 – April 7, 2013**

Vehicle Unveilings: **23**

North American Debuts: **60+**

Concept Cars: **11**

New York was the life of the proverbial auto show party with its inventive, attention-getting methods of delivery. After James Bond actor, Daniel Craig, unveiled the Range Rover Sport by taking it for a spin around Manhattan, the vehicle enjoyed a 94% jump in interest throughout the show. The celebrity appearance highlighted a new, lighter aluminum uni-body frame that is expected to improve the vehicle's fuel efficiency and performance.

Audi took an equally offbeat approach by shuttling members of the press to the Chelsea Piers Photo Studio to get a sneak peek at the Audi A3 and S3 sedans. This private press unveiling resulted in a 69% increase in share of Jumpstart shoppers during the show and nabbed Audi the 3<sup>rd</sup> largest increase of any vehicle at the New York show.

Kia again pulled in a significant increase of 62% with the Soul; a compact crossover that showed subtle design updates to its exterior, but focused more heavily on refinements of the driving experience.

## What to Expect Next Year

If the SUV category continues to keep pace (Jumpstart's Q1 analysis showed the segment had a 6% increase from the end of 2012 to Q1 2013), we're sure to see more SUV top performers at the 2013–2014 auto shows. And with diesel fast gaining ground this year (Audi, BMW, and Dodge among others all have diesel models coming out this fall) and the Truck segments continuing to pick up speed, we'll likely see more from this unlikely pair next time around. ●

*For this study, share of shopper was measured by looking at the percent of people visiting a brand's make/model page during the show and in the three weeks prior. This number was then compared to the total number of visitors across Jumpstart's portfolio of sites.*

## New York Top 5

THE VEHICLE	THE BIG DEAL	INCREASE IN SHARE OF SHOPPERS
<b>Land Rover Range Rover Sport</b>	<b>2014 Unveiling</b>	<b>94%</b>
<b>Jaguar XK</b>	<b>XKR-S GT Unveiling</b>	<b>86%</b>
<b>Audi A3</b>	<b>A3 Sedan Unveiled to Press Off-Site</b>	<b>69%</b>
<b>Kia Soul</b>	<b>2014 Unveiling</b>	<b>62%</b>
<b>Hyundai Equus</b>	<b>2014 Unveiling</b>	<b>55%</b>

## More Top Performers

THE VEHICLE	THE BIG DEAL	INCREASE IN SHARE OF SHOPPERS
<b>Cadillac CTS</b>	<b>2014 Unveiling</b>	<b>54%</b>
<b>Scion tC</b>	<b>2014 Redesign</b>	<b>52%</b>
<b>Buick LaCrosse</b>	<b>2014 Unveiling</b>	<b>46%</b>
<b>Honda Odyssey</b>	<b>2014 Unveiling</b>	<b>41%</b>

# The Luxury Segments Race Ahead And Chevrolet Gears Up For A Big Comeback

Luxury Sedan shoppers now represent 29% of all Sedan shoppers, up a full point from 2012—and an increase of nearly 4%. This segment is expected to keep growing through the rest of the year.

**From vehicle segment increases and decreases to the brands that are gaining (and losing) momentum, Jumpstart Automotive Group takes a close look at first quarter online automotive shopping trends.**

The unemployment rate fell from 7.6% in March to 7.5% in April while the economy added 165,000 new jobs in April, making it clear that the U.S. economic recovery is still in full swing. In addition to these optimistic numbers, the current U.S. gas average is \$3.50 a gallon—30 cents less than this time last year.

However, while the economy seems to be looking up and the automotive industry is keeping pace, it is still unclear whether the \$85 billion U.S. budget sequestration that went into effect in March will have an impact on consumer confidence. Based on first quarter light vehicle sales, confidence hasn't been shaken yet. The seasonal annual adjusted rate (SAAR) was up 8% from the same period last year.

## Luxury Leaps Ahead

In line with Jumpstart's predictions, the Luxury segment grew to 14.6% share of light vehicle sales—more than doubling overall industry gains from 2012. The Luxury SUV and CUV segments had the biggest increases.

## Big Three Stay Strong

Ford, General Motors, and Chrysler all had strong sales in March, with Ford and Chrysler reporting the highest numbers since the beginning of the recession. Ford, which has five of the of the Top 10 models across Jumpstart's portfolio of sites, has not only successfully innovated while maintaining its loyal fan base, but continues to engage consumers in unique and provocative ways. Most recently, the company announced a \$50,000 prize for software developers who can produce a

smartphone app that will take data from a vehicle's on-board computer and educate drivers on how to drive more efficiently.

"So far this year, there have been quite a few success stories among domestic auto brands," said Libby Murad-Patel, Jumpstart's Senior Director of Strategic Insights. "The industry is changing, driven by a younger, less brand-loyal segment of car buyers who spend more time online shopping comparable makes and models. Automakers, particularly the domestic brands, have turned up the volume on quality, affordability, reliability, and technology, which is leveling out the playing field in segments typically dominated by imports."

## Chevrolet Gears Up for Success

But Ford may want to keep an eye on General Motors as the company puts full power behind its Chevrolet rebranding efforts, repositioning the Impala to attract a more youthful audience and planning a return to the midsize truck market. The logic behind this decision is simple according to president of GM North America, Mark Reuss. Reuss told the *Detroit Free Press* in April, "There is a buyer out there that doesn't need everything that a full size truck does." A Jeep Wrangler pickup truck is also rumored to be in the works in 2013.

Meanwhile, a weak European economy continues to take its toll on auto manufacturers. The European auto market shrank a total of 9.8% in the first quarter with sales dropping 10% in March—the 18th consecutive month of declined sales. BMW's profits slipped 3%, which the company attributes to its increased investments in new technology and new production facilities. Volkswagen and Daimler sales declined as well with Volkswagen sales revenue shrinking 1.6% and Daimler first quarter net profits falling 3%. The slump is particularly disconcerting for Daimler, which has been working on moving its luxury brand, Mercedes-Benz, ahead of premium competitors BMW and Audi by the year 2020.

**Ford may want to keep an eye on General Motors as the company puts full power behind its Chevrolet rebranding efforts, repositioning the Impala to attract a more youthful audience and planning a return to the midsize truck market**



image source: Chevrolet.com

## A Closer Look

Here's a closer look at the vehicle segments, makes, and models that captured the largest share of online auto shoppers in the first quarter.

### Share Of Shoppers: The Top 10 Models

MAKE	MODEL	CALENDAR YEAR 2012	Q1 2013
<b>Chevrolet</b>	<b>Corvette</b>	<b>1.6%</b>	<b>2.6%</b>
<b>Ford</b>	<b>Mustang</b>	<b>2.8%</b>	<b>2.6%</b>
<b>Ford</b>	<b>F-150</b>	<b>1.5%</b>	<b>2.0%</b>
<b>Ford</b>	<b>Escape</b>	<b>1.7%</b>	<b>1.8%</b>
<b>Honda</b>	<b>Accord</b>	<b>2.0%</b>	<b>1.8%</b>
<b>Ford</b>	<b>Focus</b>	<b>1.7%</b>	<b>1.7%</b>
<b>Honda</b>	<b>Civic</b>	<b>1.6%</b>	<b>1.5%</b>
<b>Toyota</b>	<b>Camry</b>	<b>1.5%</b>	<b>1.5%</b>
<b>Ford</b>	<b>Explorer</b>	<b>1.1%</b>	<b>1.5%</b>
<b>Nissan</b>	<b>Altima</b>	<b>1.3%</b>	<b>1.3%</b>

Corvette experienced a 62% increase during the first quarter of 2013, largely due to the reveal of the highly publicized 2014 Stingray at this year's North American International Auto Show in Detroit. This growth moved the Corvette up from fifth to first on the Top 10 list, replacing the Ford Mustang (which had an 8% decrease from 2012).

The F-150 saw a significant increase of 31%, moving it up from seventh to third on the list. F-150 now represents 2% of all vehicles shopped on Jumpstart sites.

As U.S. pickup truck sales continue to gain momentum in 2013, Ford plans to boost its F-150 production.

The Ford Explorer has moved its way back into the Top 10 after falling out in 2012. With a 32% increase in Share of Shopper during the first quarter, Explorer now represents 1.5% of all vehicles shopped on Jumpstart's sites. The Ford Explorer replaced the Ford Fusion, which dropped off the Top 10 list during the first quarter.

### Share Of Shoppers: Brand

MAKE	CALENDAR YEAR 2012	Q1 2013	% VARIANCE	+ / -
<b>Ford</b>	<b>14.0%</b>	<b>14.7%</b>	<b>5.0%</b>	<b>0.70%</b>
<b>Chevrolet</b>	<b>9.5%</b>	<b>10.4%</b>	<b>9.5%</b>	<b>0.90%</b>
<b>Toyota</b>	<b>9.1%</b>	<b>9.3%</b>	<b>2.2%</b>	<b>0.20%</b>
<b>Honda</b>	<b>7.4%</b>	<b>7.0%</b>	<b>-5.4%</b>	<b>-0.40%</b>
<b>Nissan</b>	<b>6.1%</b>	<b>6.0%</b>	<b>-1.6%</b>	<b>-0.10%</b>
<b>Audi</b>	<b>4.7%</b>	<b>4.1%</b>	<b>-12.8%</b>	<b>-0.60%</b>
<b>Hyundai</b>	<b>4.3%</b>	<b>3.7%</b>	<b>-14.0%</b>	<b>-0.60%</b>
<b>BMW</b>	<b>3.1%</b>	<b>3.5%</b>	<b>12.9%</b>	<b>0.40%</b>
<b>Dodge</b>	<b>3.7%</b>	<b>3.4%</b>	<b>-8.1%</b>	<b>-0.30%</b>
<b>Subaru</b>	<b>2.4%</b>	<b>3.4%</b>	<b>41.7%</b>	<b>1.00%</b>

Much has remained unchanged in the Top 10 brands since the end of 2012. However, BMW did manage to surpass Dodge at 3.5% with an increase of nearly 13%.

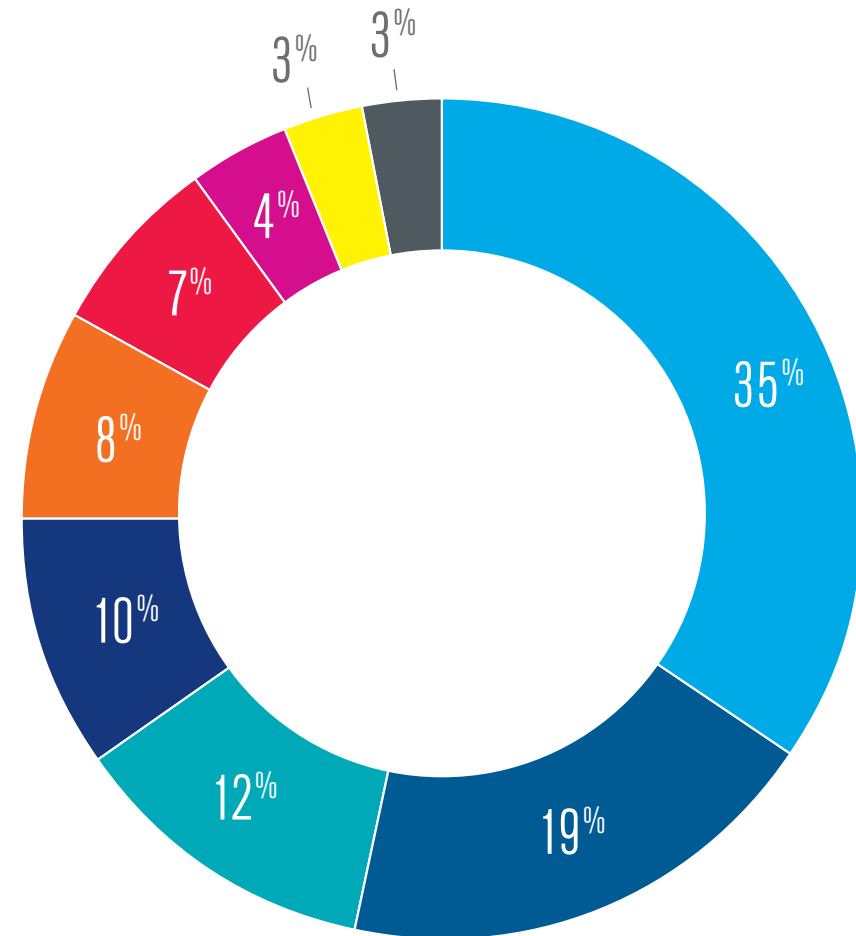
Overall, Subaru saw the most significant positive movement in the first quarter, gaining a full percentage point in share—an increase of nearly 42% from 2012. This gain moved Subaru up four spots into 10th place. Much of the automaker's growth is attributed to the new XV Crosstrek and Forester's share growth of nearly 40% since the end of 2012.

## Share Of Shoppers: Segments

Sports Cars/Convertibles gained a percentage point, growing 11% since the end of 2012.

The Sedan segment saw a 3% decrease in share, dropping one percentage point, and marking its first decrease in over two years.

Alternative Fuel vehicles also dropped one percentage point in overall share, marking a 25% decrease since the end of 2012.



- SEDAN
- SPORT/UTILITY VEHICLE
- CROSS/UTILITY VEHICLE
- SPORTS CAR/CONVERTIBLE
- TRUCK
- COMPACT/COUPE
- WAGON
- ALTERNATIVE FUEL
- VAN

Perhaps the biggest surprise in share of shoppers across segments came from the SUV segment. The segment came out with a 6% increase from the end of 2012 to Q1 2013, which allowed a percentage point gain in overall share. This increase is the first that the SUV segment has seen since 2010.

## Share Of Shoppers: Sedans

MAKE	MODEL	CALENDAR YEAR 2012	Q1 2013
Honda	Accord	7.7%	7.3%
Ford	Focus	6.4%	7.0%
Honda	Civic	6.1%	6.1%
Toyota	Camry	5.8%	6.1%
Nissan	Altima	5.1%	5.1%
Ford	Fusion	5.3%	5.1%
Chevrolet	Impala	3.8%	4.4%
Toyota	Corolla	3.5%	4.0%
Chevrolet	Malibu	3.2%	3.9%
Dodge	Charger	3.2%	3.3%

The Honda Accord, which has consistently pulled in the highest volume and share of shoppers, experienced a 5% decrease, but was still able to remain in the number one spot among small and full-size sedans.

The first quarter showed marked improvement for the Chevrolet division and a number of its nameplates, proving that the company's repositioning efforts are indeed paying off. In the Sedan segment, Chevrolet ended the quarter with the most movement in the Top 10, with increases of 17% for Impala and 23% for Malibu. As part of the company's "Find New Roads" campaign, Chevrolet introduced its 2014 Impala, a more modernized, sleeker model that the company hopes will appeal to a younger audience.

**Chevrolet ended the quarter with the most movement in the Top 10, with increases of 17% for Impala and 23% for Malibu**



image source: Chevrolet.com



## Share Of Shoppers: Luxury Sedans

MAKE	MODEL	CALENDAR YEAR 2012	Q1 2013
<b>BMW</b>	<b>3-Series</b>	<b>10.6%</b>	<b>9.0%</b>
<b>Audi</b>	<b>A4</b>	<b>7.6%</b>	<b>6.7%</b>
<b>Cadillac</b>	<b>CTS</b>	<b>6.1%</b>	<b>6.5%</b>
<b>Mercedes-Benz</b>	<b>E-Class</b>	<b>3.3%</b>	<b>5.5%</b>
<b>Acura</b>	<b>TL</b>	<b>5.6%</b>	<b>5.2%</b>
<b>Audi</b>	<b>A6</b>	<b>4.7%</b>	<b>5.0%</b>
<b>BMW</b>	<b>5-Series</b>	<b>4.4%</b>	<b>4.9%</b>
<b>Cadillac</b>	<b>ATS</b>	<b>—</b>	<b>4.5%</b>
<b>Lexus</b>	<b>GS</b>	<b>3.1%</b>	<b>3.6%</b>
<b>Volvo</b>	<b>S60</b>	<b>3.1%</b>	<b>3.4%</b>

As expected, the highly competitive Luxury Sedan sub-category is still going strong. With a 65% increase, Mercedes-Benz E-Class experienced the highest gains in the Luxury Sedan sub-category. The 2014 model garnered a significant amount of press and consumer attention at the Detroit Auto Show in January, helping to move the E-Class six spots in the Top 10 list. And with the new model hitting dealers this spring and summer, it is anticipated that E-Class share of shoppers will continue to grow in 2013.

Although the BMW 3-Series continues to hold the top spot in the segment, its share has decreased again in the first quarter to the tune of 15% (this follows an annual decrease of 7% from 2011 to 2012).

While Audi A4 remains second highest in share of Luxury Sedan shoppers, it also experienced a decrease of 12% in the first quarter.

The recently launched Cadillac ATS has quickly moved its way into the Top 10—grabbing almost a 5% share of the Luxury Sedan segment since its release in late Summer 2012.

## Share Of Shoppers: SUVs

MAKE	MODEL	CALENDAR YEAR 2012	Q1 2013
<b>Ford</b>	<b>Escape</b>	<b>11.1%</b>	<b>11.2%</b>
<b>Ford</b>	<b>Explorer</b>	<b>7.4%</b>	<b>9.0%</b>
<b>Jeep</b>	<b>Wrangler</b>	<b>6.5%</b>	<b>6.7%</b>
<b>Toyota</b>	<b>RAV4</b>	<b>7.6%</b>	<b>6.6%</b>
<b>Jeep</b>	<b>Grand Cherokee</b>	<b>5.5%</b>	<b>6.3%</b>
<b>Chevrolet</b>	<b>Tahoe</b>	<b>3.6%</b>	<b>5.8%</b>
<b>Subaru</b>	<b>Forester</b>	<b>3.9%</b>	<b>5.4%</b>
<b>Toyota</b>	<b>Highlander</b>	<b>4.4%</b>	<b>4.5%</b>
<b>Honda</b>	<b>CR-V</b>	<b>4.6%</b>	<b>3.9%</b>
<b>Jeep</b>	<b>Liberty</b>	<b>2.6%</b>	<b>3.8%</b>

Ford Escape held on to the lead across small and full-size SUVs with 11.2% of the segment, but has only seen 1% growth since 2012. Right behind the Escape is the Explorer, which jumped 21% and now represents 9% of SUV shoppers.

Chevrolet is showing growth in the SUV segment as well with the Tahoe, having the largest increase among the Top 10 at 61%. This increase moves the Tahoe from the 10th spot to the sixth spot, representing nearly 6% of SUV shoppers.

Jeep Liberty also saw significant growth at 46%, making it a new addition to the Top 10 list. Jeep now has three SUVs—Wrangler, Grand Cherokee, and Liberty in the Top 10 with a combined share of nearly 17%

Subaru increased its digital marketing spend to move 2013 Forester inventory, spending \$4 million in the first quarter (up from \$2.5 million it spent in the fourth quarter of 2012). This marketing decision seemed to have paid off—Forester had a 40% growth in the SUV category, increasing Subaru's share of shoppers across Jumpstart shoppers overall.

Toyota RAV4 and the Honda CR-V had the biggest decreases in the Top 10, dropping 14% and 15%, respectively.

## Share Of Shoppers: Luxury SUVs

MAKE	MODEL	CALENDAR YEAR 2012	Q1 2013
Cadillac	Escalade	15.7%	18.4%
Porsche	Cayenne	14.0%	15.4%
Infiniti	FX	9.8%	8.5%
Volvo	XC90	7.2%	7.7%
Lincoln	Navigator	5.8%	6.9%
Land Rover	Range Rover	6.2%	6.7%
Mercedes-Benz	GL-Class	5.1%	5.8%
Infiniti	QX	5.2%	5.5%
Mercedes-Benz	G-Class	3.4%	5.0%
Infiniti	JX	1.3%	4.0%

**Infiniti still represents three of the Top 10 Luxury SUVs, collectively holding an impressive 18% share of the Luxury SUV segment**



image source: InfinitiUSA.com

Cadillac Escalade, which saw almost 40% growth in 2012, experienced yet another increase in Q1 with a 17% increase in share of Luxury SUV shoppers. Escalade continues to lead the segment with a minimum of a 10-percentage point lead on all but one competitor (Porsche Cayenne).

Infiniti JX was new to the Top 10 after its reveal in 2012 (its 2013 model), replacing Lexus LX with a share of 4%—growing more than 200% in its first year. Unfortunately, Infiniti's sister vehicle, FX, was the only vehicle in the Top 10 to experience a decrease, bringing Infiniti's share down a full point from the end of 2012. Despite that decrease, Infiniti still represents three of the Top 10 Luxury SUVs, collectively holding an impressive 18% share of the Luxury SUV segment.

Mercedes-Benz G-Class had the second highest growth rate, increasing its share of segment by 47%, moving it up from eighth at the end of 2012 to seventh in the first quarter. The GL-Class now represents nearly 6% of all Luxury SUVs shopped on Jumpstart sites.

## Share Of Shoppers: CUVs

MAKE	MODEL	CALENDAR YEAR 2012	Q1 2013
Chevrolet	Equinox	11.9%	11.3%
Hyundai	Santa Fe	5.8%	9.4%
Ford	Edge	8.7%	9.0%
Kia	Sorento	7.4%	8.8%
Mazda	CX-5	4.9%	6.6%
GMC	Acadia	5.5%	6.3%
Nissan	Murano	5.9%	6.2%
Hyundai	Tucson	6.0%	5.3%
Jeep	Compass	3.6%	4.4%
Subaru	XV Crosstrek	—	4.2%

Despite seeing a 5% decrease from the end of 2012, Chevrolet Equinox managed to dominate in CUV shopper share. There has been a larger gap between Equinox and competitors in the CUV segment, however Hyundai Santa Fe and Ford Edge are starting to close that gap.

Santa Fe had the largest increase (62%) in the segment, bringing its share of shoppers up from 5.8% to 9.4% and moving it ahead four spots on the Top 10 list to the number two spot.

Mazda CX-5 followed in growth with a 34% increase in Q1 2013, moving it up three spots on the Top 10 list. This comes after having significant growth in its first year (as it replaced the popular Mazda CX-7).

The Subaru XV Crosstrek, which is also in its first year on the market, placed 10th on the list at 4.2%. In just a short period of time, the Crosstrek replaced the Dodge Journey, which decreased 5% in share since the end of 2012.

**Santa Fe had the largest increase (62%) in the segment, bringing its share of shoppers up from 5.8% to 9.4% and moving it ahead four spots on the Top 10 list to the number two spot**



image source: HyundaiUSA.com

## Share Of Shoppers: Luxury CUVs

MAKE	MODEL	CALENDAR YEAR 2012	Q1 2013
Acura	MDX	11.6%	12.5%
Buick	Enclave	9.7%	9.8%
Audi	Q5	19.9%	8.8%
BMW	X5	7.0%	7.7%
Lexus	RX	7.7%	7.6%
BMW	X1	1.7%	6.4%
Cadillac	SRX	6.2%	6.1%
Audi	Q7	5.9%	5.8%
Buick	Encore	0.8%	5.5%
BMW	X3	4.8%	5.3%

The BMW X1 and Buick Encore are two newly released vehicles (2013 models) that have already garnered significant consumer interest. The two replaced the Acura RDX and Mercedes-Benz M-Class in the Top 10 Luxury CUVs on Jumpstart sites.

Anticipation of the 2013 Audi Q5 redesign brought its share of Luxury CUV shoppers up to nearly 20% in 2012. Unfortunately, Q5 wasn't able to hold that high share rate and has suffered a large decline since becoming available, decreasing 56% in share during the first quarter. This decrease has caused Q5 to drop from the first place down to third on the Top 10 list with share of about 9%.

Acura MDX is now back in first place due to an 8% increase since 2012. The MDX was able to hold onto its top spot, in part, because of the sharp decline of the Q5.

As expected, the Luxury CUV segment is one that continues to gain traction. Luxury CUVs now represent 41% of all CUVs on Jumpstart sites, growing 8% from 2012.

## Share Of Shoppers: Alternative Fuel Vehicles

MAKE	MODEL	CALENDAR YEAR 2012	Q1 2013
Toyota	Prius	25.7%	25.3%
Ford	Escape Hybrid	13.8%	13.4%
Fisker	Karma	17.9%	10.3%
Ford	C-Max	4.0%	8.3%
Toyota	Highlander Hybrid	3.6%	6.1%
Honda	CR-Z	4.7%	6.0%
Chevrolet	Volt	6.9%	4.7%
Honda	Insight	3.9%	4.0%
Nissan	Altima Hybrid	5.8%	3.5%
Nissan	Leaf	0.1%	2.8%

Toyota Prius saw a 1% decrease but continues to lead in the Alternative Fuel category with a share of segment just over 25%. It has seen continuous declines since 2009 as this category has expanded and more competition has emerged.

With news of company struggles (the company laid off 75% of its workforce in April) it's no surprise that Fisker Karma saw a 43% decline in share of segment, dropping it from the second spot to the third spot on the list.

Ford C-Max is ramping up and gaining share from competitors across electric and hybrid technologies.

C-Max saw an increase of 108% from the end of 2012, moving it up three spots on the list.

Chevrolet Volt saw a 32% decrease, moving it down three spots on the list from number four to number seven. The Nissan Leaf, new to the Top 10, has nearly 3% share of Alternative Fuel vehicles.

Toyota Highlander Hybrid saw significant growth in Q1, increasing 70% and moving it up four spots on the list closer to Ford competitors, Escape-Hybrid and C-Max.

**If household incomes keep climbing, there will most likely continue to be a strong demand for luxury vehicles across all segments**



image source: Chevrolet.com

### **Looking Ahead**

How (if at all) the sequestration will affect consumer confidence remains to be seen. However, if household incomes keep climbing, there will most likely continue to be a strong demand for luxury vehicles across all segments—Sports Cars, Sedans, and SUVs and CUVS.

With real estate and small businesses rebounding, and gas prices relatively low, midsize pickup truck sales are expected to continue to climb. Automakers, including the Big Three (none of which currently make either small or midsize trucks), are likely to step up production to meet this new demand.

Chevrolet experienced some sharp gains in the first quarter, and it will be interesting to see if the company can keep the momentum in the coming months—especially with a new midsize pickup truck. General Motors plans to take on Toyota's Tacoma with at least two new truck models.

Overall, as the U.S. economy continues to strengthen and automotive sales keep pace, it will be interesting to see which brands and models come out ahead in the coming months. ●

# The Brands That Scored Big And The Brands That Got Sacked

From parachuting space babies to an emotional tribute to the American farmer, Jumpstart Automotive Group's post-Super Bowl analysis reveals which ads scored with online auto shoppers

For the fourth consecutive year, Jumpstart Automotive Group analyzed shopping behaviors through the lens of 12 automotive digital publications—an audience of more than 20 million monthly visitors<sup>1</sup>—and looked at the broader impact of automotive Super Bowl advertising. Here are the numbers:

- » An estimated 100 million Americans tuned in to watch Super Bowl XLVII
- » Advertisers spent about \$3.8 million per 30-second spot, up from \$3.5 million in 2012
- » Roughly 75% of the Top 20 most shared ads launched before the Super Bowl aired
- » Nielsen reported that automotive advertisers spent nearly three times more (\$90 million) than the next closest category of advertisers (beer)

The analysis, which was based on average assumed total ad dollars spent by each of the automakers during the Super Bowl, examined model-specific growth in share among car shoppers across its portfolio of websites. Additionally, Jumpstart calculated the estimated price each advertiser paid for every percent in share gained.

The study also looked at the immediate post-game impact, as well as an extended ROI analysis that evaluated sustained shopper interests when compared to overall media spend.

In the first analysis, Jumpstart compared traffic to brand pages on Super Bowl Sunday and Monday to traffic from prior weeks. The study then looked at the variance in share of shoppers gained after Super Bowl ads ran.

This analysis gives a clear picture of which Super Bowl commercials resonated most with in-market automotive shoppers.

## Immediate Post-Game Impact

### Jumpstart's Audience Growth

- » Traffic from mobile devices grew 12% across Jumpstart's sites on Super Bowl Sunday from the prior Sunday
- » Visits from iPhones alone grew 27%
- » New visitor growth was up 2.3% from the prior Sunday

+12% Mobile Devices

+27% iPhones

+2.3% New Visitors

Traffic from mobile devices grew 12% across Jumpstart's sites on Super Bowl Sunday from the prior Sunday



1. 20 million is based on internal traffic reporting; the audience is 9 million per ComScore



**Lincoln MKZ's share of Jumpstart shoppers grew 63% over the prior week—a growth that was nearly three times greater than the next closest advertiser (Hyundai Santa Fe)**



image source: YouTube.com

**Brand Gains**

With a broad mix of automotive ads—including ads from newcomers and brands that make appearances year after year—there were some real surprises in shopper response. Perhaps one of the most notable was from Lincoln Motor Company's rebranding efforts.

These Sunday and Monday highlights show how Lincoln MKZ's share of Jumpstart shoppers grew 63% over the prior week—a growth that was nearly three times greater than the next closest advertiser (Hyundai Santa Fe).

Lincoln MKZ, Hyundai Santa Fe, and FIAT 500 (which only ran pre-game ads) saw the greatest Sunday and Monday share of shopper gains when compared to the same time frame the prior week, with increases of 63%, 24%, and 15%, respectively. Following closely behind were Toyota RAV4 and Hyundai Sonata, which rounded out the Top 5 with 13% and 12% increases in share of shoppers across Jumpstart's sites.

Unfortunately, not all brands were successful. Kia was the only automaker to see its share of shoppers decrease on Super Bowl Sunday and Monday, with the Forte falling .5% in share of shoppers from the prior week.

ADVERTISER	SUPER BOWL SUNDAY (2/3) VS. PRIOR SUNDAY (1/27)	SUPER BOWL MONDAY (2/4) VS. PRIOR MONDAY (1/28)	SUNDAY—MONDAY 2/3–2/4 VS. 1/27–1/28
LINCOLN MKZ	20%	90%	63%
HYUNDAI SANTA FE	27%	22%	24%
FIAT 500	27%	7%	15%
TOYOTA RAV4	15%	11%	13%
HYUNDAI SONATA	20%	7%	12%

**Extended ROI Analysis: Three Weeks Post-Game**

To establish benchmark metrics, the time frame of the extended analysis began three weeks prior to the game. And to better understand the enduring effects of Super Bowl investments, the analysis continued for three weeks after the game. The chart below highlights results of the analysis in total media spend, share of shopper growth over the studied period, and the estimated price per share of shoppers gained.

The analysis also highlighted which advertisers had the highest estimated media spend, which ads brought the greatest lift in automotive shopper share, and which ones had a lasting impact on consumers after the game was over. Among auto advertisers, the estimated media spend ranged from \$3.8 million to \$15.2 million per brand.

ADVERTISER & SPOT NAME	ESTIMATED 2013 SUPER BOWL MEDIA SPEND	AVERAGE THREE-WEEK GROWTH IN SHARE OF SHOPPERS	APPROXIMATE PRICE PER PERCENT OF SHARE GAINED
Audi S6 "Prom"	\$7,600,000	-5%	\$7,942,000
Hyundai Santa Fe "Team"	\$3,800,000	-1%	\$3,846,000
Hyundai Sonata Turbo "Stuck"	\$3,800,000	3%	\$1,486,000
Jeep "Whole Again"	\$15,200,000	0%	\$15,206,000
Kia Forte "Hot Bots"	\$3,800,000	0%	\$3,812,000
Kia Sorento "Space Babies"	\$7,600,000	11%	\$667,000
Lincoln MKZ "#SteerTheScript"	\$11,400,000	7%	\$1,688,000
Lincoln MKZ "Phoenix"	\$3,800,000	7%	\$563,000
Mercedes-Benz CLA-Class "Soul"	\$7,600,000	1%	\$5,610,000
Ram "Farmer"	\$15,200,000	15%	\$993,000
Toyota RAV4 "Wish Granted"	\$7,600,000	-2%	\$7,755,000
Volkswagen Beetle "Get In. Get Happy."	\$7,600,000	6%	\$1,300,000

Note: The estimated spend was derived from the reported average cost of \$3.8 million per 30-second spot. This average cost was reported by USA Today, the Wall Street Journal, the New York Times, and Advertising Age. The estimated price per share of automotive shoppers gained is calculated by using the estimated media spend against the variance in share of brand shoppers on Jumpstart's sites.



### Highest Media Spend

- » Jeep, Ram, and Lincoln spent the most at an estimated \$15.2 million each
- » Jeep and Ram aired two-minute spots, while Lincoln divided its MKZ campaign into the 90-second “#SteerTheScript” and the 30-second “Phoenix” ads
- » Kia spent \$7.6 million on its 60-second Sorento “Space Babies” ad and \$3.8 million on its 30-second Forte ad “Hot Bots”
- » Overall, Kia spent \$11.4 million on both Super Bowl spots
- » Audi, Kia, Mercedes-Benz, Toyota, and Volkswagen all ran 60-second spots, at an estimated cost of \$7.6 million each

ADVERTISER	SPOT NAME	ESTIMATED MEDIA SPEND
JEEP	WHOLE AGAIN	15,200,000
RAM	FARMER	15,200,000
LINCOLN MKZ	PHOENIX WITH #STEERTHESCRIPT	15,200,000
AUDI S6	PROM	7,600,000
KIA SORENTO	SPACE BABIES	7,600,000
MERCEDES-BENZ CLA-CLASS	SOUL	7,600,000
TOYOTA RAV4	WISH GRANTED	7,600,000
VOLKSWAGEN BEETLE	GET IN. GET HAPPY.	7,600,000

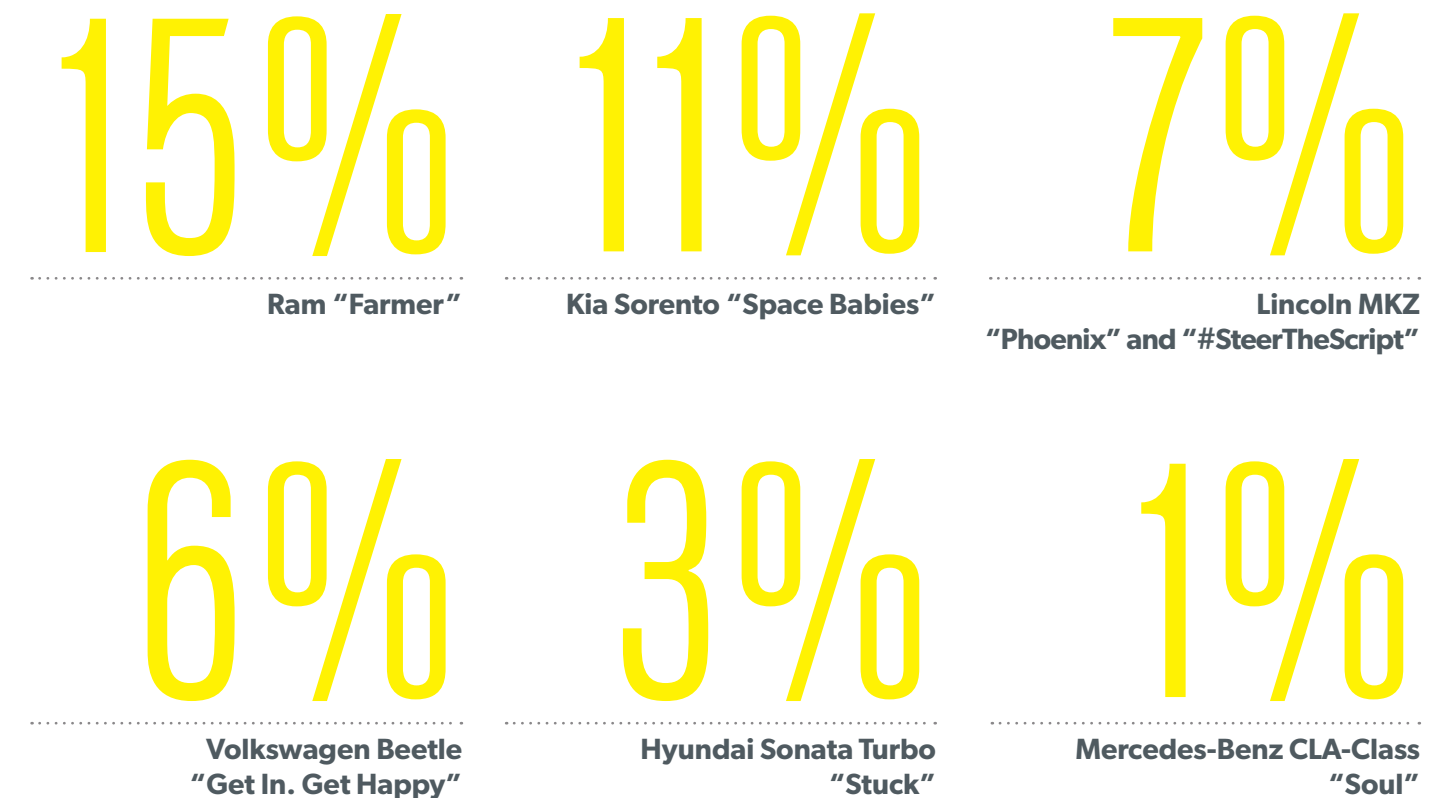
### Growth in Share of Jumpstart Shoppers

Ram, Kia Sorento, and Lincoln MKZ came out on top with the highest growth in share of shoppers in the three weeks following the game, compared to the three weeks prior to the game. Ram gained the greatest share (15%) with its “Farmer” ad, an emotional tribute to the American farmer. And Kia saw an 11% growth with the help of its “Space Babies”, an ad that featured an adorable baby (and dozens of animals) parachuting to Earth from space. Audi’s “Prom” had the largest decrease at 5%.

Lincoln MKZ, with boosted traffic from two advertising spots totaling 120 seconds and costing \$15.2 million, scored the third highest increase in an average three-week share of shopper growth. Overall, Lincoln Motor Company had a decrease of 5.6%, even though the MKZ—which was the only vehicle to be featured in two spots—experienced a 7% growth. The 90-second “#SteerTheScript” ad, which was actually more of a Lincoln brand message, also featured the MKZ.

Overall, seven of the 12 automotive advertisers experienced an increase in share of shoppers.

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



Ram gained the greatest share (15%) with its “Farmer” ad, an emotional tribute to the American farmer



image source: YouTube.com

### Lowest Cost Per Share of Automotive Shoppers Gained

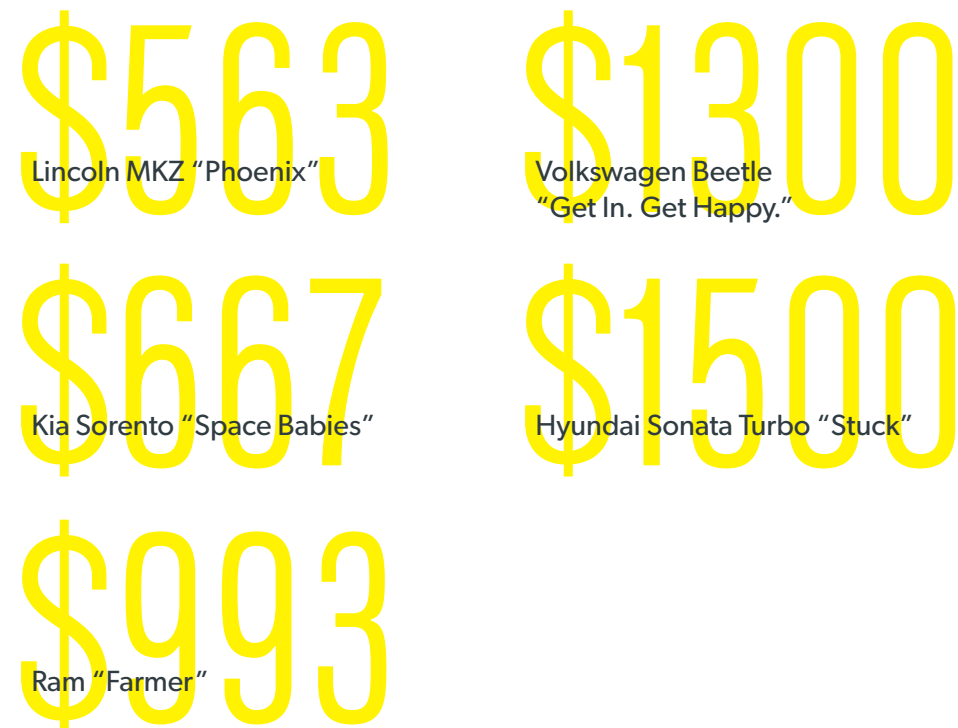
The Super Bowl continues to be a proving ground for new ideas; case in point—The Lincoln Motor Company. The MKZ’s 30-second “Phoenix” ad, which opened with images of the classic (and now discontinued) Lincoln Town Car being engulfed in flames then transforming into the MKZ, achieved the lowest estimated price per share of shoppers gained at \$563,000. However, that increase was supplemented by the imaginative “#SteerTheScript” Twitter-generated spot, an ad written entirely from real-life road trip stories tweeted to comedian Jimmy Fallon.

When combined with the “#SteerTheScript Script” ad, Lincoln MKZ ended up paying \$2.3 million per percent of share gained.

Spending a total of \$7.6 million for an 11% increase over the extended three-week period, Kia Sorento had the second lowest estimated price per share of shoppers gained at \$667,000. And although Ram tied for the highest overall Super Bowl media spend, it experienced the third lowest price per share gained at \$993,000.

In the end, Lincoln, Kia, and Ram were the only three automotive advertisers that paid less than \$1 million for every percent of share gained.

### Approximate Price Per Percentage of Share Gained (in thousands) by Advertiser and Spot Name



### Lincoln, Kia, and Ram were the only three automotive advertisers that paid less than \$1 million for every percent of share gained



image source: YouTube.com

### Highest Cost per Share of Automotive Shoppers Gained

Jeep spent \$15.2 million for its two-minute ad, “Whole Again”, but gained less than 1% in share of shoppers (essentially paying \$15.2 million per percent in share gained). The ad, which featured soldiers returning home, set against an audio backdrop of Oprah’s voice, was also one of the six most shared Super Bowl XLVII commercials.†

The Audi S6 “Prom” spot garnered the second highest price per percent of share gained at \$7.9 million due to an actual decline in share following the Super Bowl.

Toyota came in third with the RAV4 “Wish Granted” ad, which experienced the third highest cost per percent share gained at \$7.8 million. Toyota also experienced a post-game decrease in shopper share.

### Jeep spent \$15.2 million for its two-minute ad, “Whole Again”, but gained less than 1% in share of shoppers

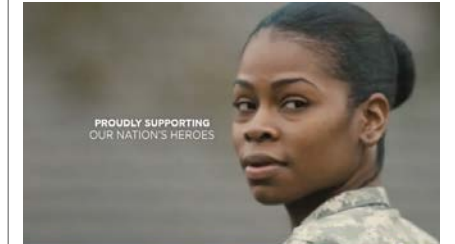


image source: YouTube.com

ADVERTISER & SPOT NAME	ESTIMATED 2013 SUPER BOWL MEDIA SPEND	AVERAGE THREE-WEEK GROWTH IN SHARE OF SHOPPERS	APPROXIMATE PRICE PER PERCENT OF SHARE GAINED
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Toyota RAV4 “Wish Granted”	\$7,600,000	-2%	\$7,755,000
Mercedes-Benz CLA-Class “Soul”	\$7,600,000	1%	\$5,610,000
Hyundai Santa Fe “Team”	\$3,800,000	-1%	\$3,846,000

† (TIME 2013)



**The Super Bowl will continue to deliver one of the largest and most engaged media audiences**

Overall, share of shopper increases immediately following the Super Bowl and over the extended three-week period were much smaller compared to the last two years. One possible explanation could be that the high volume of pre-released commercials consumers viewed/shared before the Super Bowl aired actually affected interest during the big game. With so much information leaked before game time—and not just advertisements, but half-time performances as well—some of the anticipation and surprise was gone.

Nevertheless, the Super Bowl will continue to deliver one of the largest and most engaged media audiences. And this will continue to present a phenomenal opportunity for advertisers to reach consumers—and to surprise them and engage them. But in a category as highly competitive as automotive, brands do need to be creative in their strategy. With some innovative thinking, brands will be able to keep consumers interested and engaged not only during the game, but long after it's over. ●

# The Case For Cookies: 5 Ways They Make Life Better

By Nick Matarazzo

**Recent talk around big data, retargeting, and the potential impact on consumer privacy has unleashed a torrent of criticism and controversy, especially in the wake of the NSA shake-up.**

Individual privacy is important, and no (sane) person supports identity theft. But we should be talking more often about how credible businesses are using data to create better consumer experiences.

Recent research has turned up a few insights into how consumers feel about retargeted advertising. An August 2013 *eMarketer* article citing a study by Adroit Digital and research company Toluna revealed that, “Thirty percent [of those surveyed] had a positive or very positive reaction to retargeted ads vs. 11% who felt negatively about them.”

Our search engines anticipate our queries, music streaming sites know what we want to hear, and our favorite e-commerce companies know what incentive will get us to “add to cart,” so why wouldn’t we want advertising with relevancy?

**Here are the five reasons I’m making the case for cookies.**

## 1) We Get Relevancy

The age of unleashing a barrage of ads on every user is over. Attention span is short, space is limited, and marketing dollars are being spent as efficiently as possible. If I’m in the market for a new luxury sedan, my likelihood of engaging with a luxury auto ad is much higher than if I purchased a car a year ago. And I’m more likely to engage with that ad than one for a

full-size truck. It’s more valuable to the customer to get a tailored ad and more efficient for the marketer to be relevant and find the right person for their message.

## 2) Power to the People

Let’s be real: Customers know marketers and advertisers are paying attention to their online behavior. So, we should evolve to be more consumer-centric. BlueKai, which provides behavioral data, is taking this very approach by focusing on privacy and anonymity. The company invites visitors to access all the personal data the company has collected on them. The system also gives people the choice of opting out and correcting inaccurate information. Acxiom, the data-mining giant, is also offering similar opt-out features with its newly launched website, AboutTheData.com.

## 3) The Other Guys Are Doing it—with Great Success

There are plenty of other companies—Pandora, Amazon, and Netflix—that are using similar tools to improve a user’s content experience. And, as consumers, we are happily embracing their services. If Netflix gives me a recommendation for a movie, I add it to my queue. If Amazon suggests I buy a 12-pack of golf balls to go along with a golf bag, I add it to my cart. These services are making my life better. Why would I want advertising be any different?

## 4) Hey, it Works

Last year, I had my eye on a watch. I added it to my online cart, but didn’t buy it. Ads for the same watch kept resurfacing and I finally broke down and purchased it—from the same retailer that kept reminding me how much I wanted (deserved) that watch. In the brick

and mortar world, that’s simply good salesmanship and follow-up.

## 5) I’m Talking to You, Sort of

Yes, targeting is about reaching a more relevant consumer, but there is still a high degree of anonymity. The ad may recognize that I shopped for a watch, have visited sports websites, and my Internet service is from a certain zip code, but it doesn’t know my name, phone number, email address, or credit card information.

## The Bottom Line

We’re all looking for a better user experience. For every way technology makes life simpler, there are five other ways it makes it more complicated (e.g. we carry multiple devices, have to remember dozens of log-ins and passwords, and have more choices than ever of what to buy, read, share, sell, comment on, etc.), which is why we need more optimized experiences. For me, it’s a no-brainer. Whether I’m watching a movie at home or listening to music on my way into the office, I like having a more personalized experience.

Custom experiences are good experiences. This includes devices and services that adapt to our changing needs, and that are seamlessly—almost invisibly—weaved into our everyday lives. Advertising is no exception.

So before we allow fear to overtake the entire issue, we need to take a step back and think about how retargeting is part of the solution rather than the problem. We can build our business by targeting smartly, safely, and with respect for the customer. ●

*Originally published on [iMediaConnection](#), October 14, 2013*

# 5 Best Auto Brands... If They Were Colleges

By Laura Schooling

The annual *U.S. News & World Report Best Colleges* rankings came out today, which got me thinking about how the process of choosing a new vehicle is not so different from selecting a college. A decision is preceded by dozens of questions—conscious or otherwise. How important is a brand name? What kind of return will I get from this investment? What can I expect from the experience—community, fun, prestige?

The stakes for choosing a college are arguably higher. And with hindsight being 20/20, I know there are quite a few people who would rethink their choice of college if they could (although I'm sure wherever you went was the "Harvard of the West, Arizona, Southern Florida").

So if you happen to be in the market for a new car, here's a chance to (sort of) make up for some of the errors of your youth.

See how *U.S. News* ranked the top college in five different categories and the auto manufacturer with similar brand attributes.

## **Best National University: Princeton**

Selected for their comprehensive programs—a full range of undergraduate majors, and master's and Ph.D. programs—these colleges are also committed to groundbreaking research.

## **BMW**

Any of the top-tier luxury vehicles could easily be high on the list, but BMW takes the highest honor for its

dedication to research (fuel optimization, and hybrid, electric, and hydrogen energy efficiency technologies and connected car and safety innovations). With a full range of models and options across categories and classes—and never sacrificing luxury for anything—it's like parking an Ivy League diploma in the driveway.

## **Best Liberal Arts College: Williams College**

The National Liberal Arts Colleges focus on undergraduate education and award approximately half of their degrees in liberal arts.

## **Subaru**

The spirit of exploration permeates liberal arts campuses—encouraging individual expression, philosophical questioning, and custom-designed majors. Students are free to study what they love and worry about how to make money doing it later. There is a shared sensibility with Subaru, which frowns on status and favors an emotional connection with owners (as evidenced in its "Love. It's what makes a Subaru a Subaru" campaign). And, what better vehicle to take adventurous coeds rock climbing, desert camping, and geological digging than a Subaru?

## **Best A-plus School for B Students: Syracuse University (National Universities)**

Highly rated colleges, which accept good students with subpar transcripts, are ideal for those with less impressive test scores or GPAs.

## **Ford**

Ford offers first-rate products at accessible price points, including the SYNC infotainment system in most base-

level models. The company has leveled the playing field for consumers looking for a quality vehicle at an economic price and because it has focused so much on creating a great product, buyers are proud of their savvy purchase. Even the Ford tagline "Go Further" sounds like an academic mantra.

## **Best Value School: Harvard (National Universities)**

This ranking takes into account a school's academic quality and the net cost of attendance for a student who receives the average amount of need-based financial aid. Any school with a higher quality program—and a lower cost—is a better deal.

## **Porsche**

It's hard to refer to Harvard or Porsche as a great "value" without a privileged smirk. But when you look at the number of senior executives with Harvard on their bio, it's easier to see how the money spent is easily amortized over years of high earnings. Similarly, Porsche owners are some of the happiest. For 2013, Porsche was the highest-ranked nameplate for the ninth consecutive year in the J.D. Power APEAL study (which measures consumer appeal of new vehicles).

## **Most Up-and-Coming School: University of Maryland—Baltimore County (National Universities)**

For the sixth consecutive year, *U.S. News* asked the experts to rank the institutions making the most "promising and innovative changes" in academics and faculty and student life.

## **Tesla**

There has been a new news story about Tesla nearly every day for the past year, documenting triumphs of the young automaker—record stock price, industry accolades, and increasing sales and profits. An electric car with a stunning design is worthy of up-and-coming status, but a car company reimagining the country's energy and transit infrastructure with a CEO who has his eyes on Mars needs a category unto itself.

[See all U.S. News & World Report Best Colleges 2014 rankings](#)

Each year, *U.S. News* also publishes its Best Cars for the Money Award winners. [Check out the vehicles that won in 2013.](#) ●

Originally published on [iMediaConnection](#), September 10, 2013

# 5 Ways Technology Eases Car-Buying Anxiety

By Nick Matarazzo

**For me, walking the car lot on a Saturday is nearly as fun as a day at the golf course. The shoptalk is great, I get to take something for a spin, and even if I don't come out with the exact score (or price) I had in mind, I walk away with a sense of satisfaction. But, for many, the thought of having to negotiate one-on-one can be intimidating, and can turn the thrill of buying a new car into pure anxiety.**

Choosing what to buy—make, model, trim, and a seemingly endless number of options like warranties and [infotainment](#)—is only the first step. Once the vehicle and options are selected, the real research begins: What is a fair, good, or great price—and how do I get it?

Here at [Jumpstart Automotive Group](#), we found that 69% of shoppers listed price as a top criteria when deciding to purchase—making it the second-most important factor behind safety and reliability. This mindset is hardwired into consumers across categories—from apparel to appliances—but price is especially integral to the car-buying process, primarily due to the level of investment and the lengthy duration of ownership.

And I think there is added pressure to get a good deal because of the degree of pricing transparency consumers have when shopping for a vehicle. As a consumer, you might never find out what Target paid for that Nikon camera, but you will find out what your local Ford dealership paid for that 2014 Explorer.

## So how can technology help ease car-buying anxiety?

### 1. Knowledge is Power

There is no substitute for doing your homework. Thanks to research sites like J.D. Power Autos, U.S. News Automotive, and NADAguides (which provides an estimated five-year cost of ownership—factoring in depreciation, insurance, fuel, and maintenance, and gives that total cost an overall value ranking), customers can research every detail of a vehicle and read customer, editorial, and dealer reviews without even stepping foot on a lot. *Car and Driver's* new online AccuPayment feature (in beta), allows customers to estimate monthly financing or lease payments based on transactions in their area.

TrueCar allows consumers to see what others in their geographic location have paid—and then connects them with local dealers to get TrueCar pricing.

Rick Gibbs, CEO of Dealer.com, a top provider of dealership marketing and operations software solutions, offers his advice on how dealers should respond to the transparency, “Dealers are smart to have a deeply integrated marketing strategy that ensures consistency across all channels—from rich banner ads and inventory pricing to vehicle detail pages (VDP) and social media. Consistency breeds trust, and trust leads to a good customer relationship and, ultimately, a sale and brand loyalty.”

### 2. Embrace Email

Currently in beta in the San Francisco Bay Area, [Google.com/cars](#) allows consumers to start communicating with dealers via email—providing the

quick, non-committal dialogue modern consumers thrive on. When someone searches for a vehicle on Google, a special search result shows that make/model and where it's available from local dealers. Customers click to choose their options, select a dealer, and then hit a “Get Quotes” button—providing only their name and email address.

### 3. Mobile is a Must

Jumpstart found that 76% of in-market auto shoppers surveyed used a smartphone or a tablet while researching a vehicle and 45% looked up information on a mobile device while they were at a dealership. Mobile can no longer be considered a “second screen;” it's an integral part of the shopping process and any auto manufacturer that hasn't optimized their advertising campaigns and consumer website for mobile are missing 30-40% of their target audience.

### 4. Replace Face Time with FaceTime

A handshake isn't the only way to make a connection. Elise Kephart, the Internet sales manager at Sunset Honda in San Luis Obispo, has found a new way. Instead of relying on email, Kephart posts video responses to her customers. As she explains on [thedealergeek.com](#), video responses have helped give her customers the emotional connection they're looking for.

### 5. Rock It Old School

Technology can sometimes be code for good service. After instituting no-haggle pricing two years ago, Austin-based First Texas Honda moved from 380th in sales volume to the top 30 among Honda dealerships. Dealership President, Jim Olmstead explained to *Automotive News* in June 2013, “People don't mind us making a little money, but they don't want to be the person who gets their heads knocked off. We don't hit any home runs, but we hit lots of singles.” First Texas Honda prides itself on keeping customers at ease in their relaxed, “no-pressure” showroom, offering free coffee and live music (by an all-employee house

band). Their “old fashioned” approach is paying off with an average 4.7 out of 5 from Google consumer reviews (although a less stellar 3 out of 5 on Yelp).

## The Bottom Line

While there's plenty of widely available information, it's still hard to sort through. It needs to be simplified. Customers want—and need—to know that after all their hard work finding the right vehicle, they won't overpay. Because the auto industry is constantly drumbeating messages of “affordability,” “value,” and “low cost/cost to own”—pricing will continue to be a critical factor in purchase consideration.

Companies like Zappos (and Saturn, in its day) demonstrated the positive impact of great customer service on business and brand loyalty. However, research also continues to tell us that consumers are starting to avoid the brick-and-mortar experience (Maritz Research recently found that more than 10% of new car buyers opt to skip taking a test drive). This means marketers, auto manufacturers, and dealers will need to stay one step ahead of the game by offering outstanding customer service.

My advice? Dealers: Make it easier for the customers by embracing technology and placing a bigger emphasis on great customer service. That means engaging consumers wherever they want to interact—with informative content online, a digital campaign that spans desktop, tablet, mobile, search, and social, and a friendly atmosphere at the dealership. Customers: relax. You have all the information you need to make a sound decision. Car buying doesn't have to be—and shouldn't be—that complicated.

Now, who's up for a quick spin in the Audi RS 5 to the golf course for a quick nine holes? ●

Originally published on [iMediaConnection](#), August 22, 2013



# The 5th Screen Is Not Just Another Screen

By Laura Schooling

**My car is an island and in it I am happily shipwrecked. No email, no texts, and a Bluetooth that is always not-so-mysteriously malfunctioning. Driving alone in my car—especially early morning when the streets are empty—is one of my greatest pleasures. So I’ve already started mourning, knowing this serenity may soon be coming to an end.**

There’s been a steady stream of press on autonomous vehicles recently (i.e. the self-driving car), but the more immediate evolution is really in-car connectivity—better known as “5th screen” technology.

Not surprisingly, automakers are focused on integrating the latest technology to ensure their products remain an essential part of life. This is especially crucial when trying to attract [Millennials](#) who, in a June 2013 *eMarketer* report, revealed they would be more negatively impacted if they lost their mobile phone or computer than if they lost their car.

In April, the world was introduced to the iBeetle. Using the Beetle app, the car can stream music, compare driving times and fuel economy, read iPhone messages aloud, and send digital postcards (that include the vehicle’s whereabouts) over a driver’s social networks.

Audi, which announced Audi connect technology in 2011 and recently launched the system in its 2013 A4, A5, S5, and Q5, has positioned itself as a frontrunner in the 5th screen space. Audi connect features a Google Earth-enhanced navigation system and real-time localized weather and fuel price reports. The automaker is also the first global auto manufacturer to offer factory-fitted

in-vehicle Wi-Fi for passenger use, delivering connections to up to eight devices at once.

Auto manufacturers—and the technology companies who want their business—are experimenting to get the most out of the 5th screen. Gracenote, a music metadata technology company, recently hacked the Ford Focus’ Control Area Network (CAN)—the network that manages communication between a car’s various controls and interfaces—to play music depending on the driver’s mood. By simply turning on the windshield wipers or accelerating over 50mph, drivers were able to trigger different songs.

In-car connectivity is poised to only get bigger. According to a recent report by Ernst & Young, “The global telematics market is poised to grow exponentially in the future, with approximately 104 million new cars expected to have some form of connectivity by 2025.”

While most connectivity has been promoted as active—telling the car what you want it to do—it may be the passive approach that is actually more sustainable. A new study by AAA Foundation for Traffic Safety revealed that attempting to listen and respond to emails using voice significantly impairs driving ability. The findings cite that speech-to-text systems actually require more concentration, leading a driver to be develop tunnel-like vision. *Car and Driver* Editor-in-Chief, Eddie Alterman thinks in-car connectivity should be altogether eliminated. In his [September 2013](#) Editor’s Letter, Alterman drove his point home, “The only way a car should integrate the phone today is by putting a huge warning light on top alerting other motorists to its use.”

For every distraction the connected car may pose, there are conveniences that make it worth my while. I have happily embraced SiriusXM, Pandora, and Spotify in-car infotainment (yes, my Bluetooth works perfectly when I’m syncing music). When I pay for premium packages, it’s for the exact experience I want.

As these services become standard features, I am thinking about how marketers and auto manufacturers will unite to create the ultimate SoLoMo platform—advertising based on location that is really, truly personalized.

In-vehicle advertising isn’t new (hello, radio), but advertising that could plug into the dash—funneling into GPS, manufacturer applications, or any other digitally connected platform has me thinking about the time, place, and relevance of the messages I may be served. As we’ve learned with every other screen: Context is crucial.

As automakers wrestle to find the perfect balance between connectivity, safety, and customer needs, I want them to know that while I may see my car as the largest, most powerful computer, I do not think of it as *just* another screen. If connectivity becomes a free-for-all, I would rather go back to my manual drive, vinyl seats, and tape deck. But, if in-car technology helps me play the music I’m in the mood for, avoid bad drivers, and maybe save a few bucks on gas... I’ll happily stay connected. ●

*Originally published on [iMediaConnection](#), July 30, 2013*

# Millennials Change The Auto Marketing Game

By Nick Matarazzo

**Millennials (or, if you prefer, Gen Y) are growing up, making some of their first big-ticket purchases and changing the buying game. This is particularly true for the automotive industry. Despite recent reports suggesting Millennials are driving less and waiting longer to get their license—at Jumpstart Automotive Group, Gen Y traffic has spiked 74% in the last five years.**

And, when I think about the Millennials I know best—my two boys—I can vouch for their desire to get behind the wheel (and out of the house). When it came time for them to purchase their own car, I was impressed by their depth of research and surprised by how practical they were in their decisions. It almost makes me want to give their taste in music a second chance. Almost.

Why is it essential that we understand this group of consumers? Well, according to the recent “Gen Y in the Driver’s Seat” study by Deloitte, Millennials (ages 19-31) represent about 40% of the nation’s car buying population—the largest consumer segment since the Baby Boomers. There are more than 80 million American consumers approaching the age of 30, which means that millions are moving into the new vehicle buying demographic each year.\* By 2025, Gen Y is expected to account for 75% of all vehicles purchased, with an annual buying power of more than \$2 trillion.

How can you win over this influential demographic?

## **Start with your site.**

Millennials grew up on technology and expect ease and speed when they’re on the go. Site design roadmaps

should include mobile optimization at the very least, device responsiveness at best. Pertinent information about products and services should never be more than one to two clicks away. And since Gen Y buyers rely heavily on peer advice and referrals, customer reviews and testimonials should be showcased.

## **Respond quickly.**

Millennials are always on, which means follow-up to prospective purchases should happen within minutes, not hours or days. There’s a sense of urgency among younger buyers—if they can’t find what they’re looking for (or don’t hear from you quickly when they do) chances are they’ll move on.

Jeremy Beaver, Vice President of Sales and Marketing at the Del Grande Dealer Group in San Jose, California (and a Millennial himself) agrees and says it’s all about effective communication. “Consumers want to feel connected no matter where they are, especially when it comes to younger car buyers,” said Beaver. “Whether they’re on their cell phone or tablet, or reaching us through our website or on Facebook, they need to feel like we’re responsive. Most importantly, we listen to their individual needs and help guide them to the car that best meets those needs.”

## **Develop content around key triggers.**

Overall value (as it relates to fuel economy and the availability of eco and tech-friendly features) is important to Gen Y car buyers, so develop content about the benefits of your brand/products/services around these core triggers. Interactivity is important too. Allowing young consumers to engage and interact with your content—on your site and via social media—enables them to feel more engaged and connected with you.

## **Ditch the old school sales pitch.**

Gen Y buyers (arguably, most car buyers) don’t want the hard sell—they want a consultant to guide them through the process. The Deloitte study revealed that half of Millennials surveyed said they would permanently turn against an automotive brand if they had a negative experience with a salesperson.

Millennials (virtually) kick the tires until the very week they buy a car; they’ve done their homework by comparing multiple brands, they know what they should pay, and they won’t waste time negotiating.

This group is increasingly turning to practical, reliable cars with generous warranties and excellent fuel economy (according to Deloitte, 89% will consider buying a car that gets better gas mileage). And while existing financial obligations like student loans mean tighter budgets, they still expect more refinement, even with entry-level products. They want value but value doesn’t necessarily mean a lower price tag. For Gen Y buyers, it means reliability, safety, and convenience at a reasonable price.

Make no mistake, as Gen Y’s incomes grow and technology shifts them further away from their brand-loyal predecessors, we won’t be talking about a new consumer but the consumer. ●

*Originally published on [iMediaConnection](#), June 4, 2013*

\*U.S. Census Bureau statistics

# My Love Affair With Tesla

By Laura Schooling

**I've been in love with an automotive brand before, but never like this. Volkswagen, you make me laugh; you're clever. You're exactly what I look for in a Super Bowl ad. Mercedes-Benz, you're a class act that fills me with nostalgia. Ford, we share the same values; you're nothing short of an American icon.**

But I've never felt like this before—until Tesla.

I want, and expect, great marketing from the brands I buy. And I will absolutely change loyalties if a brand I once favored produces a campaign that doesn't align with my sensibilities. So how did a brand without a big budget win my heart? Tesla tapped into the essence of what makes good marketing powerful—to do what so few can—provide an emotional connection, a vision for the future, and something to believe in that is more meaningful than what's parked in your driveway.

The visionary, and complicated, Elon Musk is not only the figurehead of Tesla (and head of product); he is also the man behind Solar City and SpaceX. He doesn't just want to make beautiful cars; he strives to change the way we travel, make Earth inhabitable longer, and send people to Mars.

I want to support a brand that is not one small step for the environment, but one giant leap toward Mars!

The brand has certainly hit a few bumps along the road, but it has had unparalleled praise as of late. Tesla shares were up as high as \$110 (up from \$35 just three months ago) and the company reported a quarterly profit for the first time, one that exceeded Wall Street estimates. Aside from having borrowed a stimulus loan of \$465 million, Tesla is now valued at nearly \$20 billion dollars and intends to repay the loan five years early.

Online consumers are also expressing their interest in the Tesla Model S. Traffic to Tesla pages across the Jumpstart portfolio of sites is up 86% over last year. This spike is the result of increased interest from a variety of consumers as well as a migration to Tesla from Fisker—once a real competitor, now a classic case of “what could have been.” Audi, a consistent stronghold in the luxury space, should also keep an eye out as consumers who are looking at the A6 and A7 are also looking at the Model S.

Critics rave about Tesla, like those at Consumer Reports who declared the Model S the best car ever tested. And despite projections that its lofty price tag might prevent car buyers from paying all that green to go green, more people bought the Model S than any of the similarly priced gasoline-powered cars from the Top 3 German luxury brands in Q1 of this year. And, 2013 Model S sales estimates just recently jumped from 20,000 to 21,000.

The Model S is a quiet beauty that resonates with modern car buyers, some of whom have likened it to “driving an iPad.” It makes a statement of greater purpose while turning heads in the process.

It made a believer out of me. But, with a starting price of \$62,400 for the smallest battery and \$87,400 for the performance model—not to mention a plug-in infrastructure that is still in its infancy—for the time being, I'm only expressing my love via the stock market. I hope to one day be united with my own Model S, but nobody ever said true love was easy. ●

*Originally published on [iMediaConnection](#), June 3, 2013*



image source: teslacars.wordpress.com



# Eyes On The Prize

Three Different Takes On What To Watch For In 2014  
(Plus, A Few Fun Facts To Satisfy Your Curiosities)



**Nick Matarazzo**  
Chief Executive Officer

## Technology

Mobile payment solutions

## Auto Tech

Heads-up display (information projected onto a windshield) in all cars

## Digital Advertising

Measurable engagement across platforms

## Up-And-Coming Segment

Trucks!

## Dream Car

1964 Pontiac GTO

## Perfect Day

A round of golf and a good cigar



**Laura Schooling**  
Chief Marketing Officer

## Technology

A way to truly scale native, dynamically

## Auto Tech

Self-driving cars

## Digital Advertising

Premium Programmatic

## Up-And-Coming Segment

Subcompact cUVs

## Dream Car

Tesla Model X

## Perfect Day

Tennis (doubles)  
Lunch (Mexican)  
Margaritas (spicy & with salt)



**Libby Murad-Patel**  
Senior Director Strategic Insights

## Technology

Robotics and wearable tech

## Auto Tech

Vehicle safety tech (car-to-car communication, blind spot monitoring, lane sensors)

## Digital Advertising

Natural language search

## Up-And-Coming Segment

Luxury

## Dream Car

1960 Mercedes-Benz 300SL

## Perfect Day

Michigan beaches, good food, and wine





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