2009 Automotive Marketing and Media Annual Review

When Will the Market Rebound?
What Marketing Issues Should Be Watched?

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September 23, 2009

Agenda

- Keeping score in the industry
- The ongoing importance of print media
- The critical role of consideration
- Understanding online buyer behavior
- The dynamics of Buzz
- Professional vs. personal blogging
- Media patterns by segment
- A look forward at the hottest new models
- Q & A

Industry Situation Summary

- We are going through a restructuring of consumer preference in response to new economic realities
  - Strict credit standards are still affecting vehicle loan applications
  - Unemployment rose to a 26 year high of 9.7% nationwide in August
  - 19% drop in retail sales forecasted for 2009 (22% drop total)

Sources: U.S. Bureau of Labor Statistics
J.D. Power Automotive Forecasting

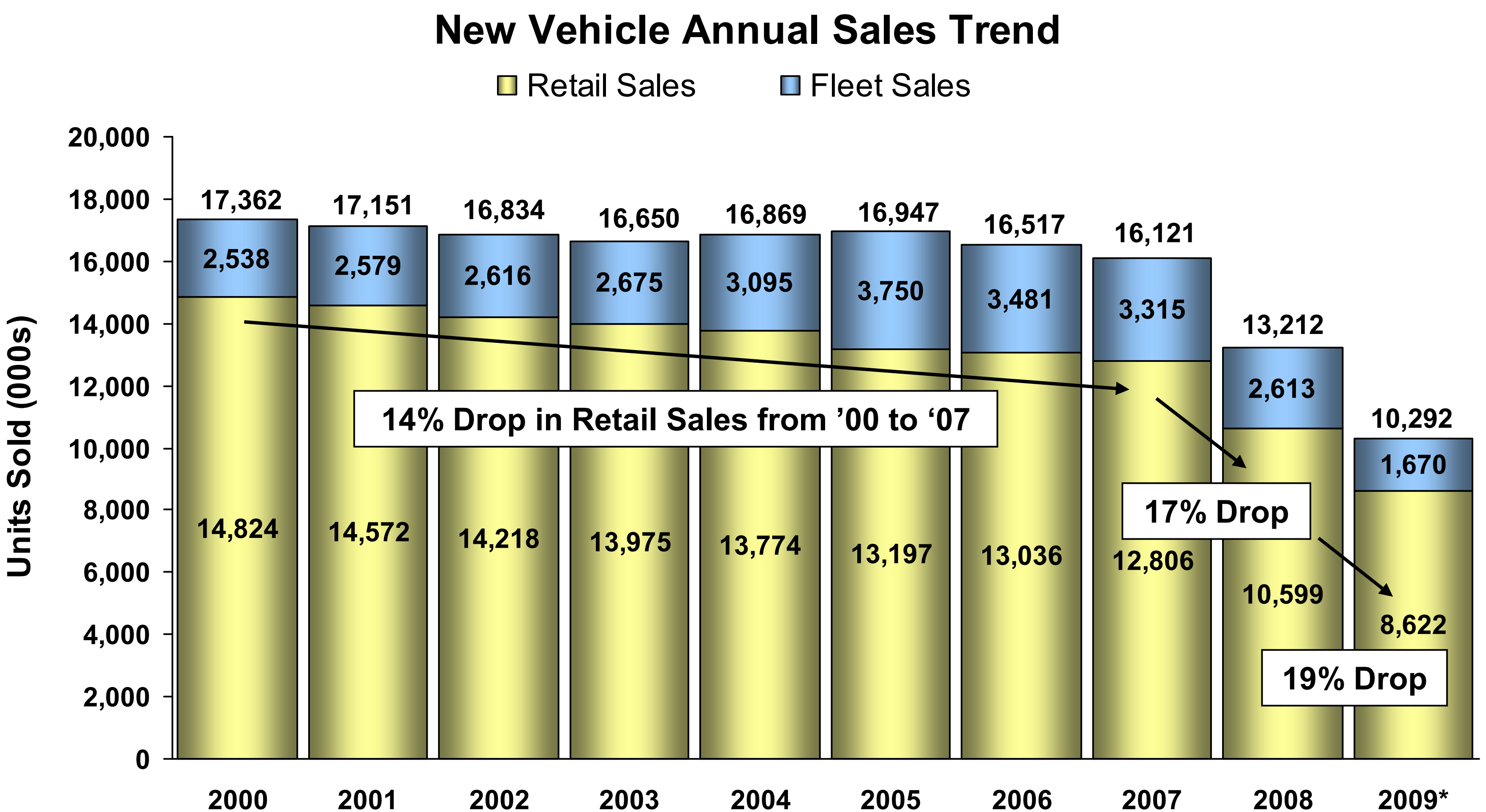
Recovery is near

- The government's Cash for Clunkers program sparked new vehicle sales in July and August
  - A total of 690,114 vehicles were traded-in and purchased through the CARS program
- Consumer Confidence Index increased from 47.4 in July to 54.1 in August
- Housing prices rose 2.9% from Q1 to Q2 this year
- Used-vehicle prices have been rising recently
- Signs of recovery are near with financial markets improving, but recovery will be sluggish

Sources: Department of Transportation, Car Allowance Rebate System
Conference Board Consumer Confidence Index
S&P Case-Shiller Index

Sales Trends

The year is expected to end 19% down



* Forecast

Source: J.D. Power Automotive Forecasting

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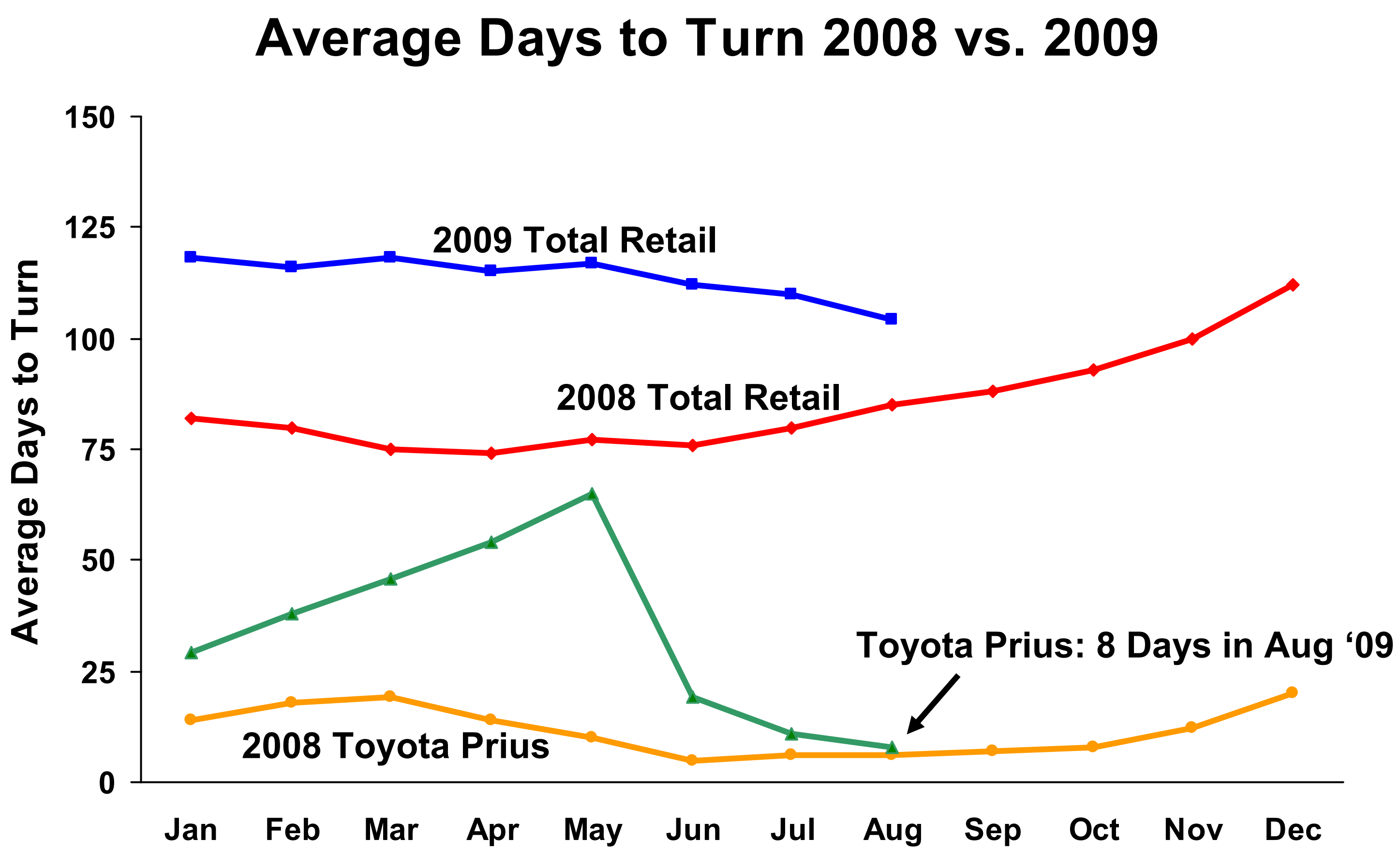
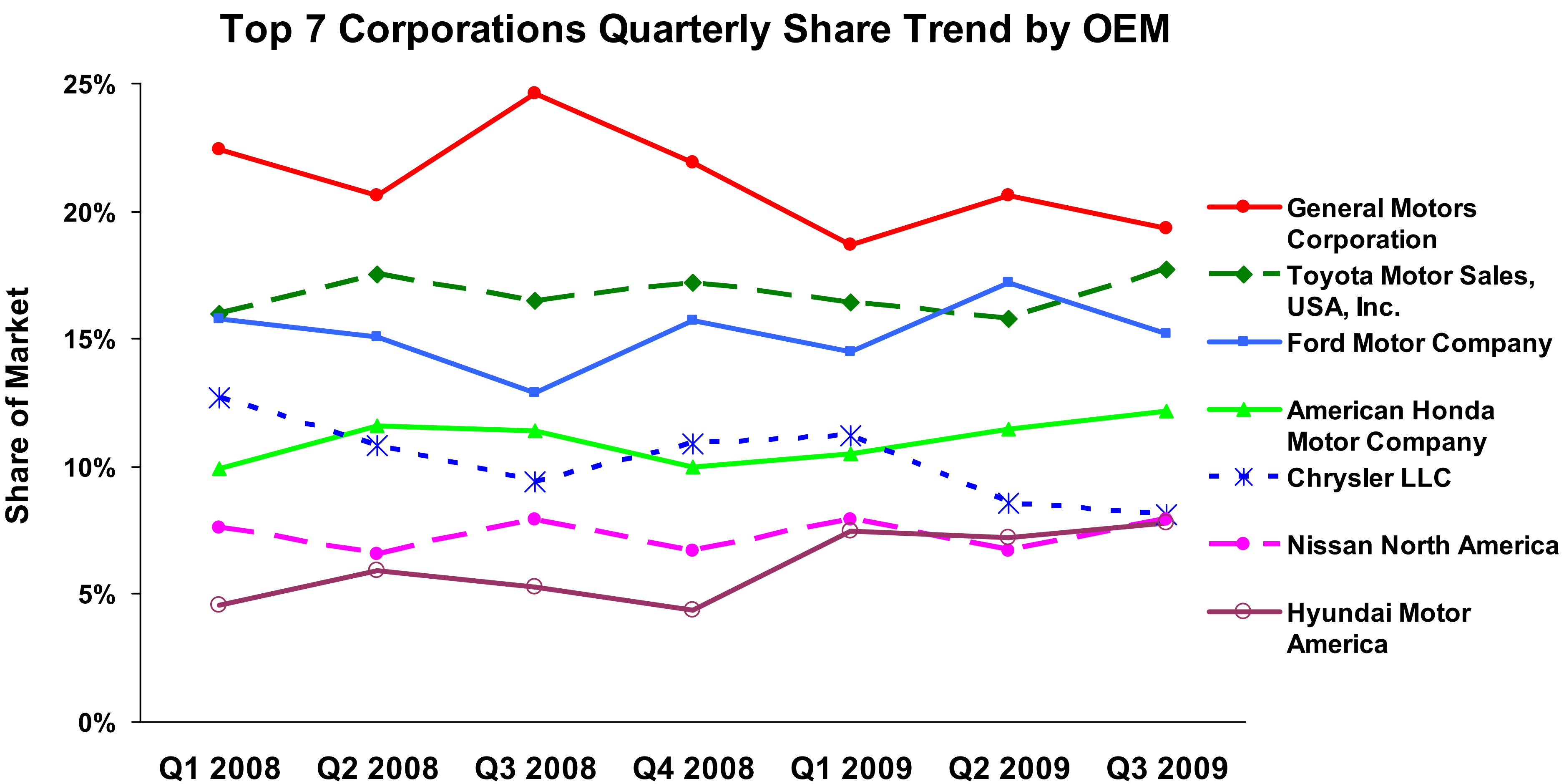
The average retail turn rate has increased since last year



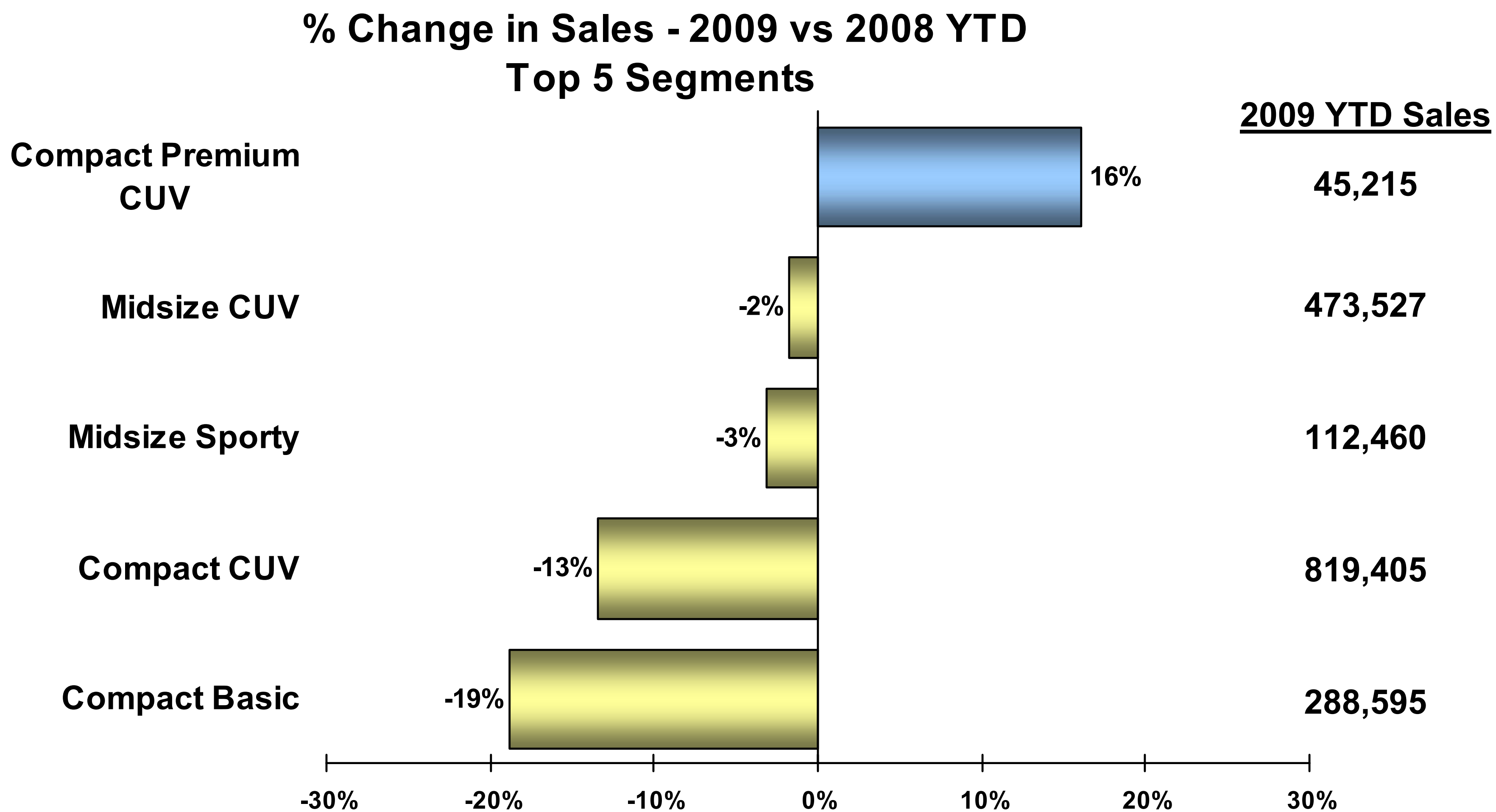
- Source: Power Information Network
- The retail turn rate is the average number of days that a model remains on a dealer lot before selling.
- If a unit is dealer-traded, the retail turn rate returns to zero at the time of trade.

While total sales are down, it's important to see how market share is shifting



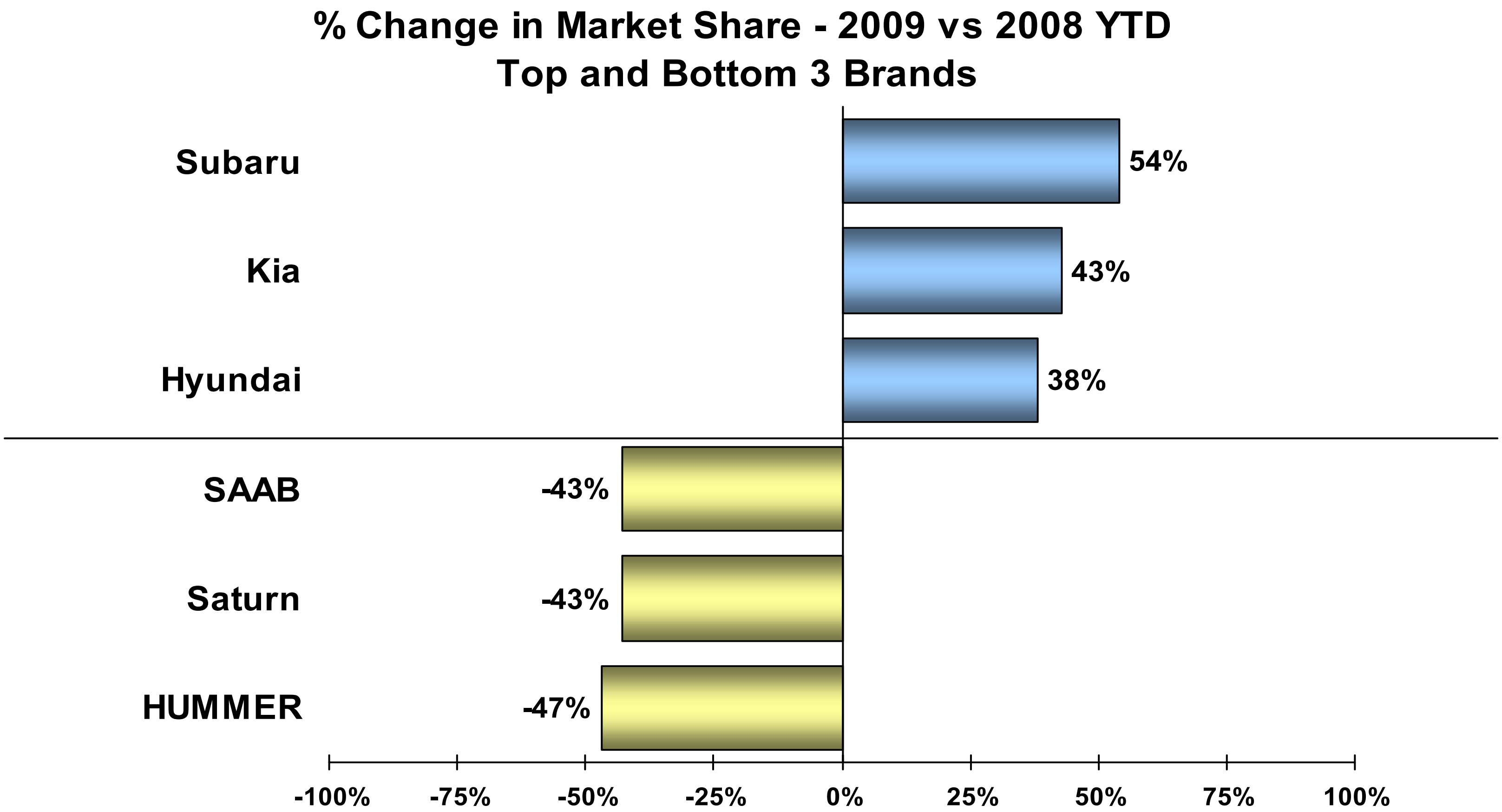
Source: JDPA Sales Report, August 2009
Includes both retail and fleet sales; Q3 2009 represents July and August Sales

Compact Premium CUV has had the only positive percent change in sales in 2009 so far



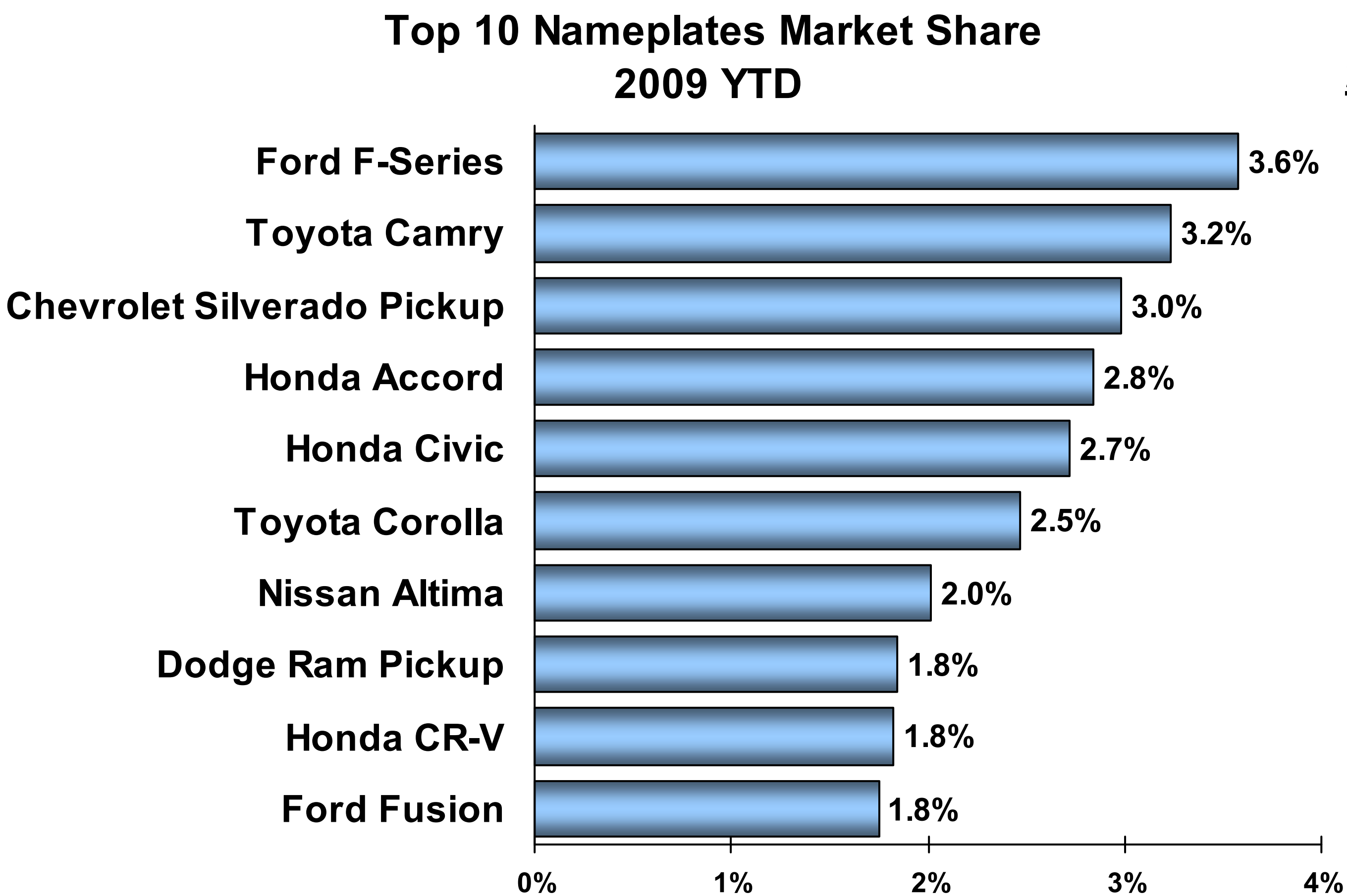
Source: JDPA Sales Report, August 2009

Subaru, Kia, and Hyundai have increased market share the most this year



Source: JDPA Sales Report, August 2009
Note: Discontinued brand Isuzu not shown

Market Share – Top 10 Nameplates



2009 YTD Sales

252,286
228,154
209,987
200,543
191,790
174,625
142,513
129,753
128,352
123,766

Source: JDPA Sales Report, August 2009

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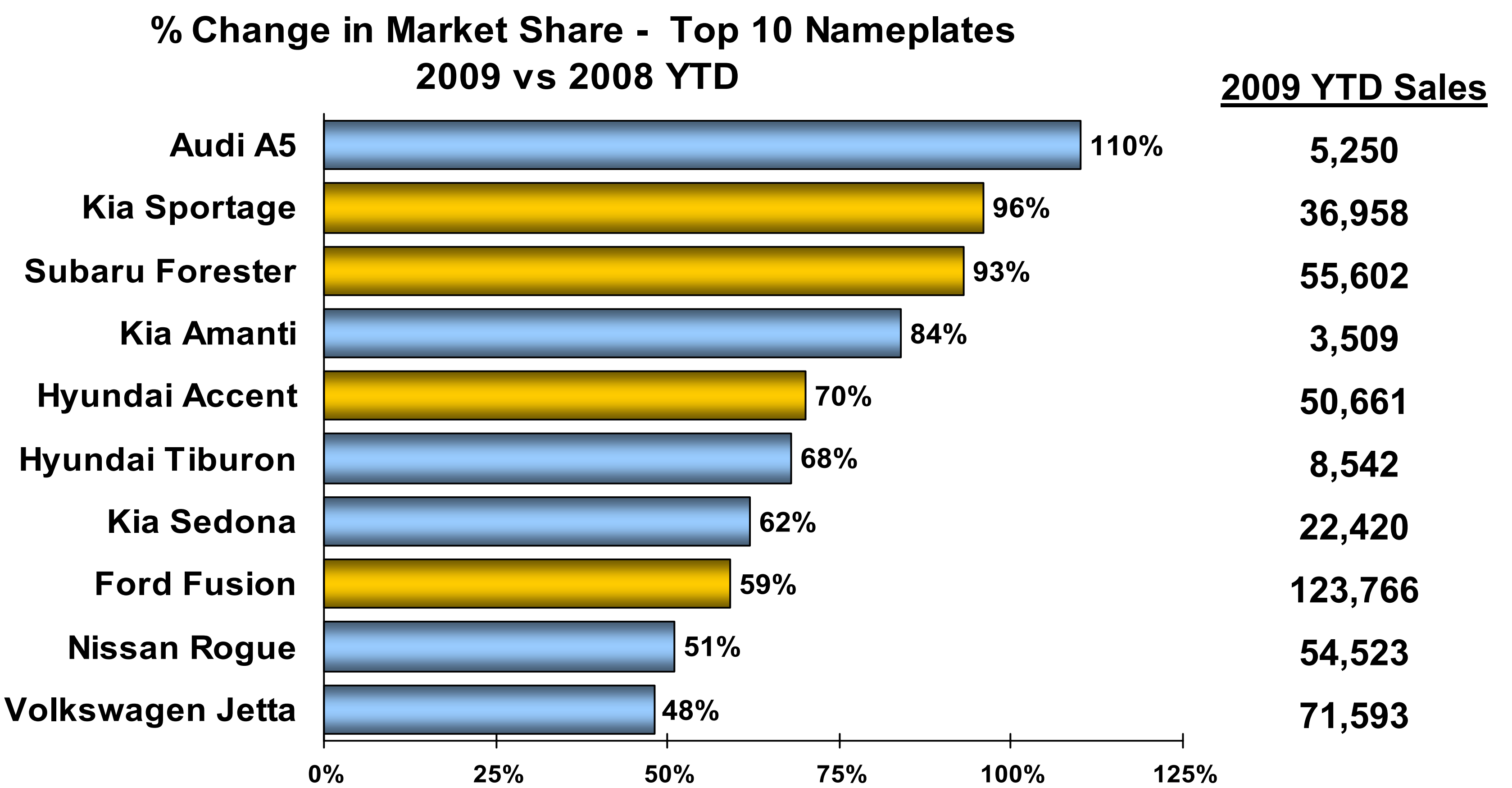
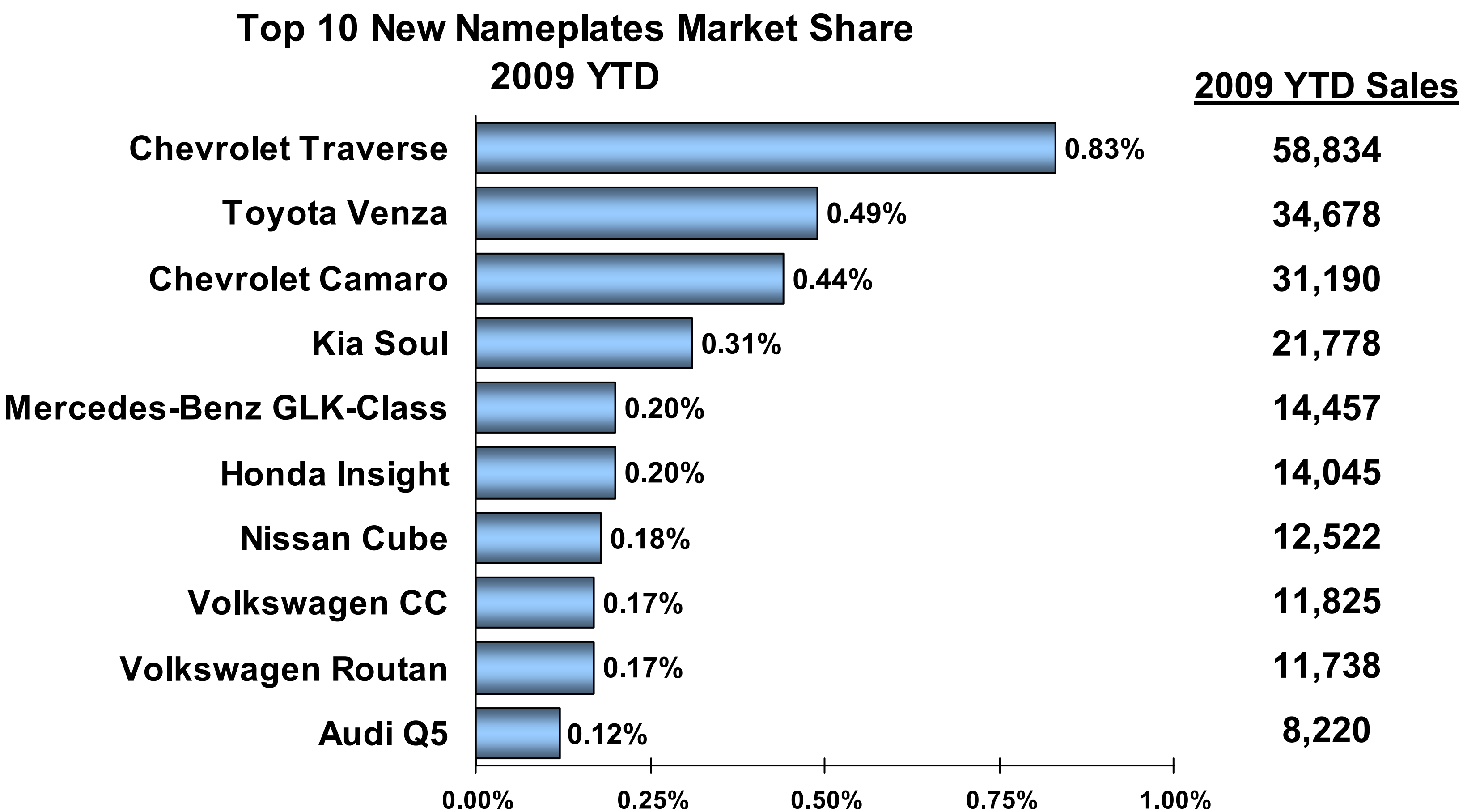
Change in Market Share – Top 10 Nameplates



Source: JDPA Sales Report, August 2009
Note: New models are not shown

= Redesign

Market Share – Top 10 New Nameplates



Source: JDPA Sales Report, August 2009

This week's snapshot of the industry shows an overall loss, although BMW is performing well

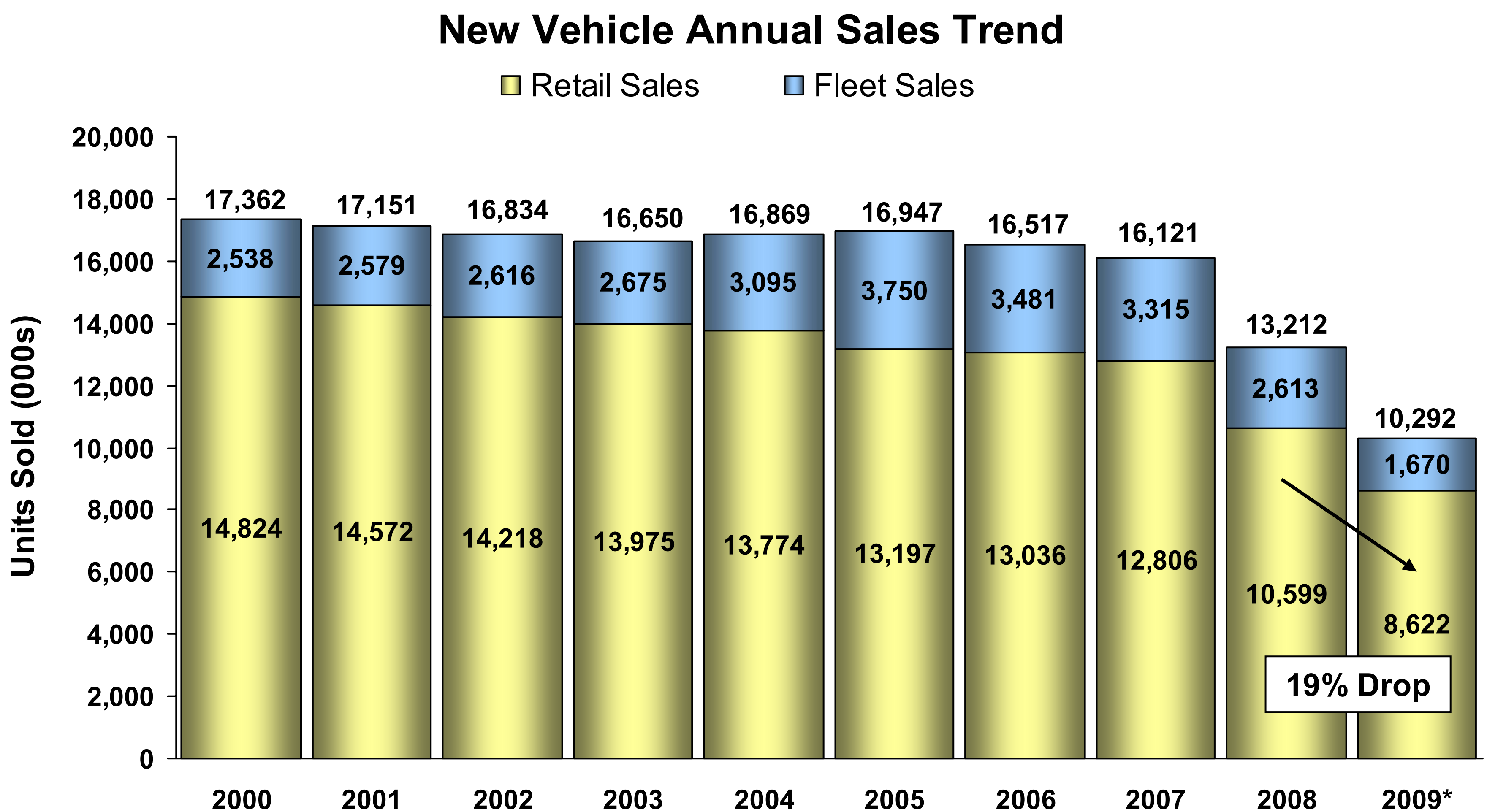
Corporations Month to Date Year-Over-Year Sales Performance As of 9/20/09		
INDUSTRY	Down	23.2%
BMW of North America	Up	9.3%
Nissan North America	Down	1.4%
Volkswagen of America, Inc.	Down	3.9%
Hyundai Motor America	Down	7.3%
Ford Motor Company	Down	9.1%
Daimler AG	Down	10.1%
Toyota Motor Sales, USA, Inc.	Down	15.1%
American Honda Motor Company	Down	24.0%
General Motors Corporation	Down	43.8%
Chrysler LLC	Down	47.4%

Source: Power Information Network

All figures based on year over year comparisons for the month to date of September (Sep 01 '09 – Sep 20 '09 vs. Sep 03 '08 – Sep 21 '08)

Forecast

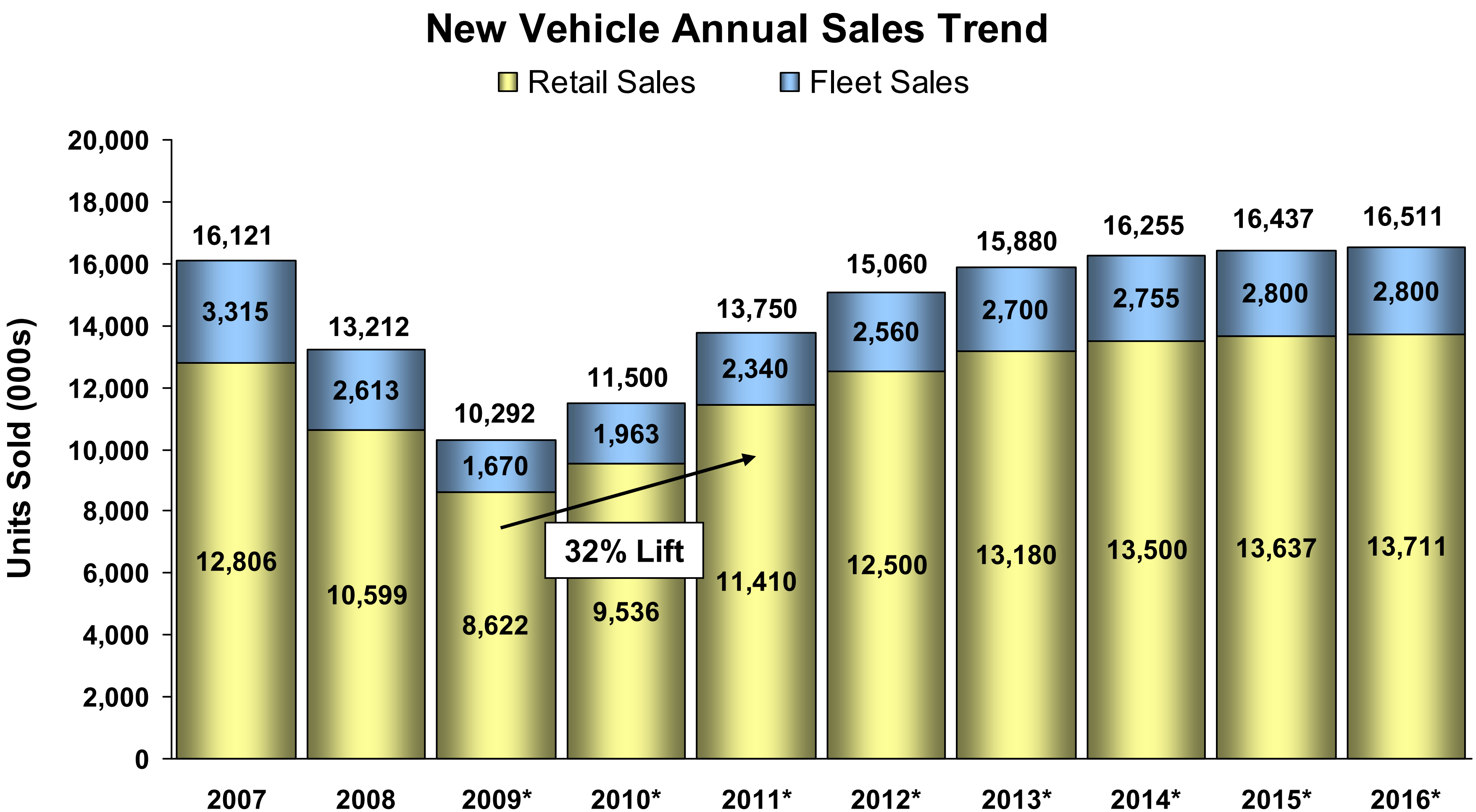
The year is expected to end 19% down



* Forecast

Source: J.D. Power Automotive Forecasting

Gradually, lost sales are forecasted to return in 2010 and beyond



* Forecast

Source: J.D. Power Automotive Forecasting

J.D. Power and Associates

Automotive Marketing and Media Studies

Our study portfolio includes three ways of collecting information to provide actionable insights

J.D. Power and Associates
Automotive Marketing and Media Solutions

Strategic

Automotive Marketing Radar (AMR)

Avoider

Used Vehicle Market Report (UVMR)

Performance Improvement

Launch Assurance Study

Manufacturer Web Site Evaluation Study (MWES)

Social Media Brand Deep Dive#

Media Measurement

Auto Buyer Clickstream Platform*

- Prospects Current Behavior (PCB)*
- In-Market Buyer Behavior (IMBB)*
- Web Site Performance Tools (WSPT)*

Power Auto Offline Media Report

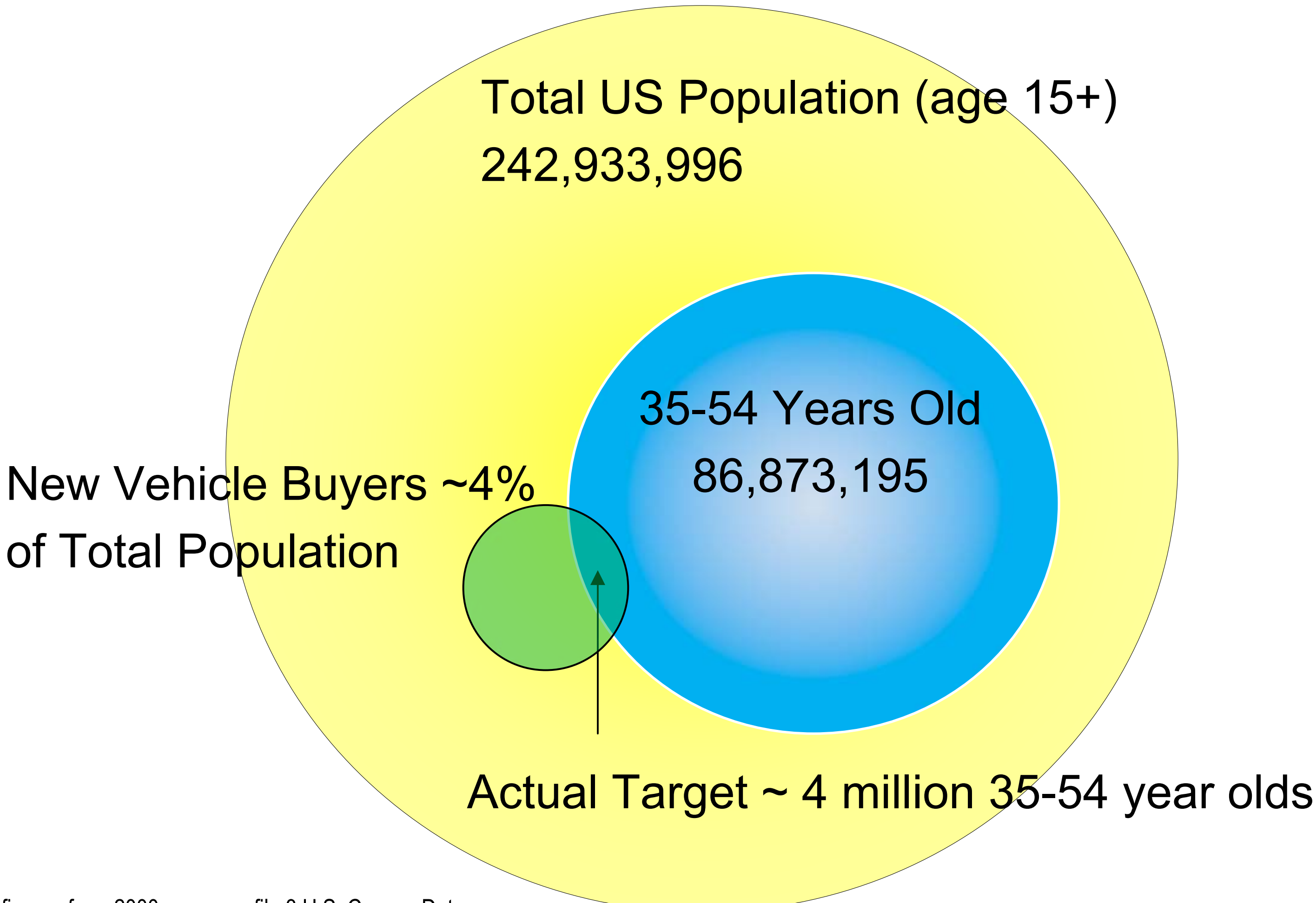
- MRI Product & Psychographic Supplement

Social Media Auto Brand Monitor#

*New JDPA Products
Web Intelligence Products

In automotive marketing, demographic targeting can miss the mark

Targeting by Age can Misrepresent Your True Audience



Source: Population figures from 2000 summary file 3 U.S. Census Data

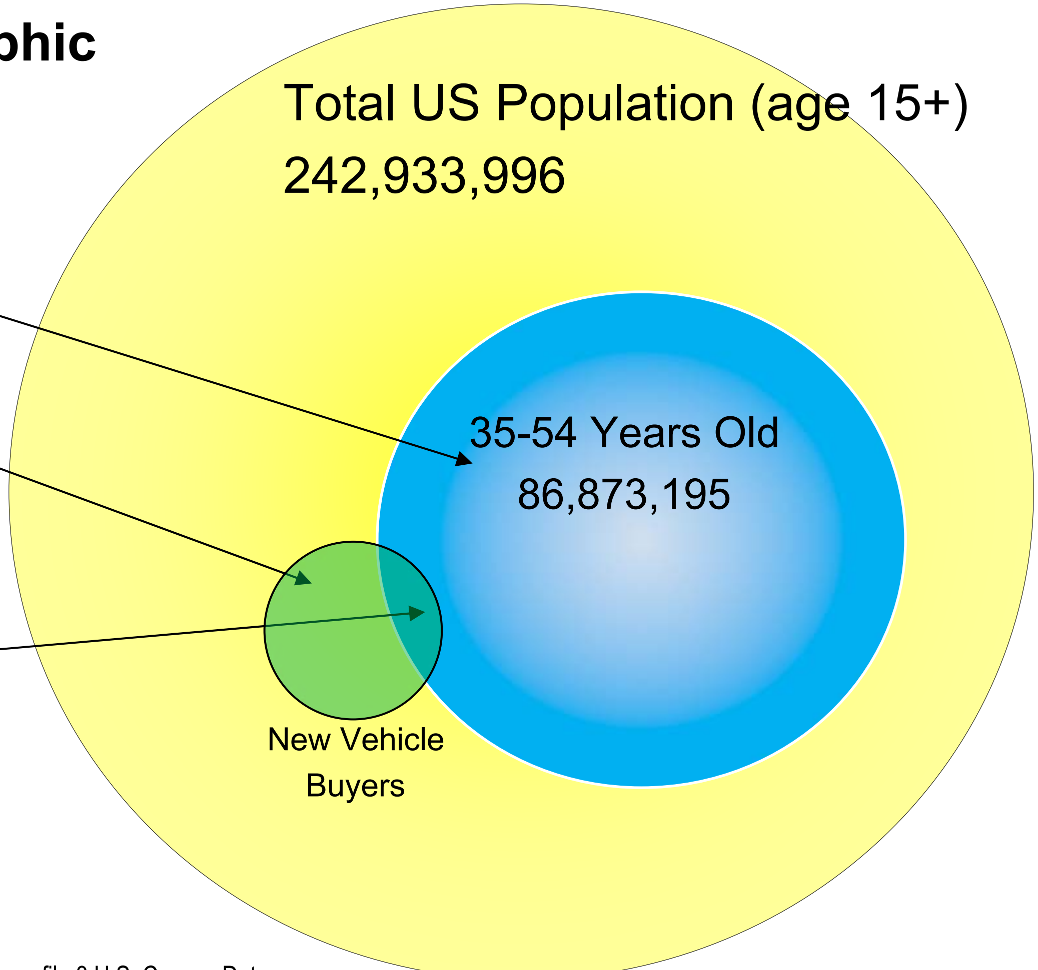
In automotive marketing, demographic targeting can miss the mark

With demographic targeting:

Paying for

Looking for

Actually only
Getting
~ 4 million



Source: Population figures from 2000 summary file 3 U.S. Census Data

David Poltrack, Chief Research Officer of CBS TV agrees

“ Age and sex data have no relationship to the value of a medium to an advertiser.

Purchase behavior is needed to describe value.”

ARF Audience Measurement Conference

New York

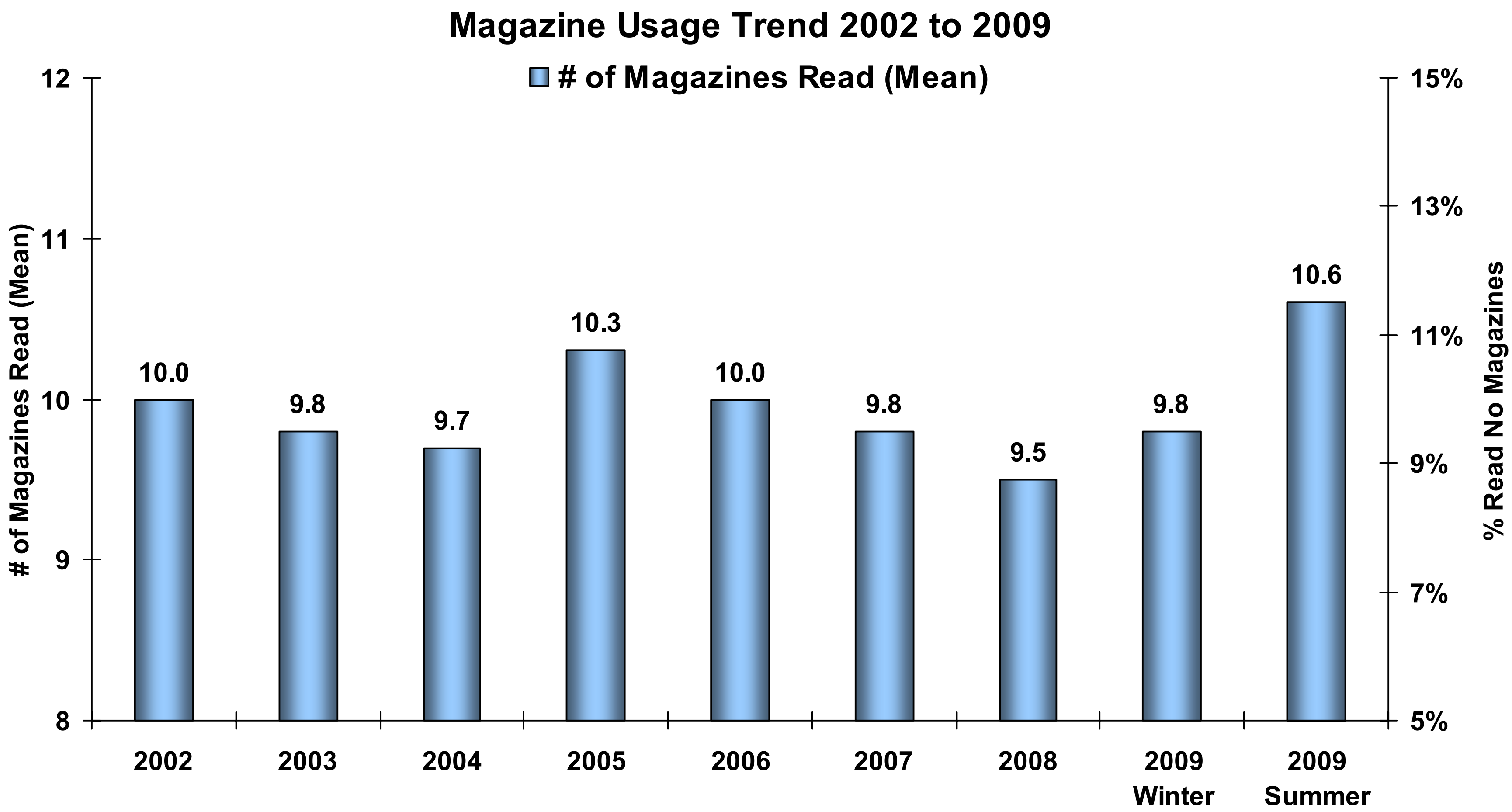
June 24, 2009

2009 Power Auto Offline Media Report Summer Update

2009 Power Auto Offline Media Report, Summer
Major improvements

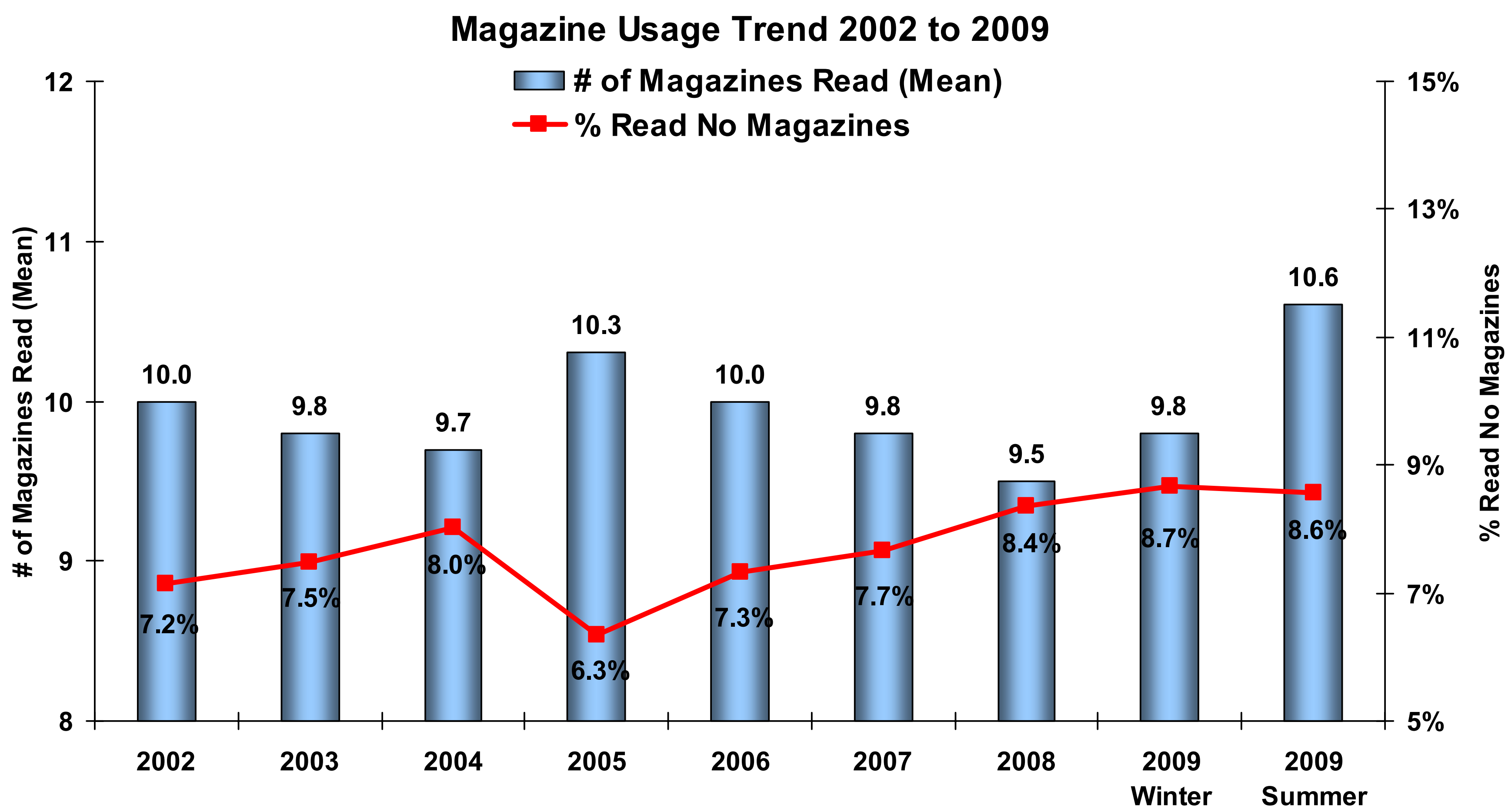
- Faster, more frequent reporting
  - Rolling 12 months of sales
  - Summer Release (August ‘09): November ‘07 – October ‘08 Buyers
  - Winter Release (January ’10): May ‘08 – April ‘09 Buyers
- Increased, updated information
  - Lease, loan, and cash financing
  - Positive and negative recommendations
  - New sports and activities in played/participated section
  - Use of consumer generated content
  - Spanish language questions
  - Environmental questions

Magazine readership still remains high



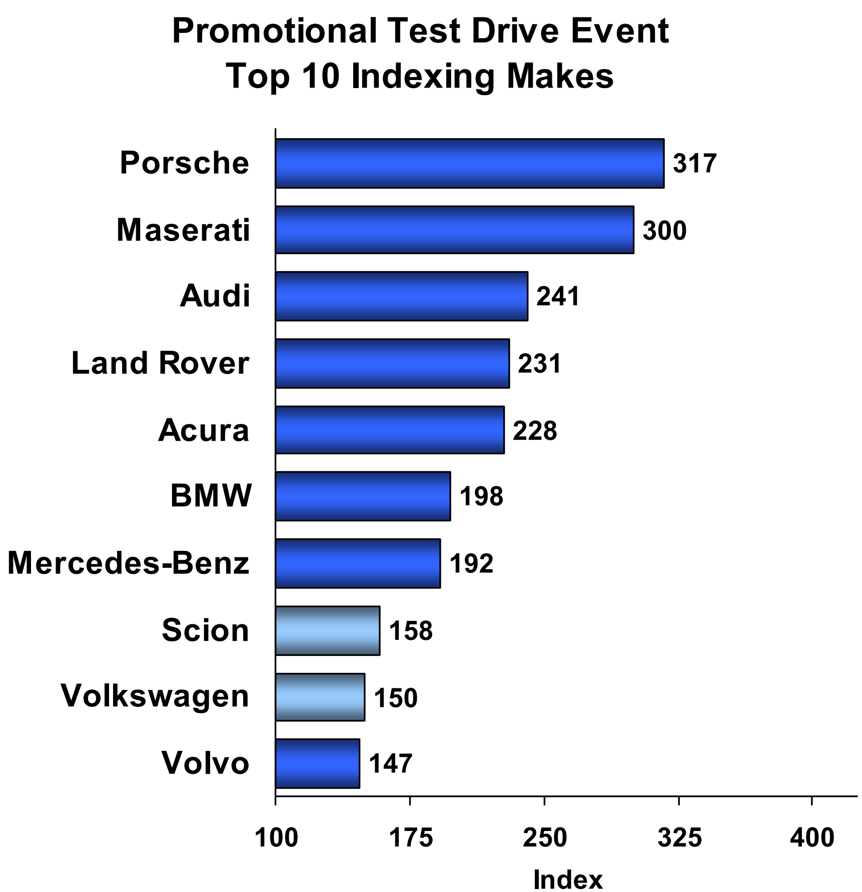
Source: 2002-2009 Power Auto Offline Media Reports
# of Magazines Read in Last 6 Months (including Sunday Supplements)

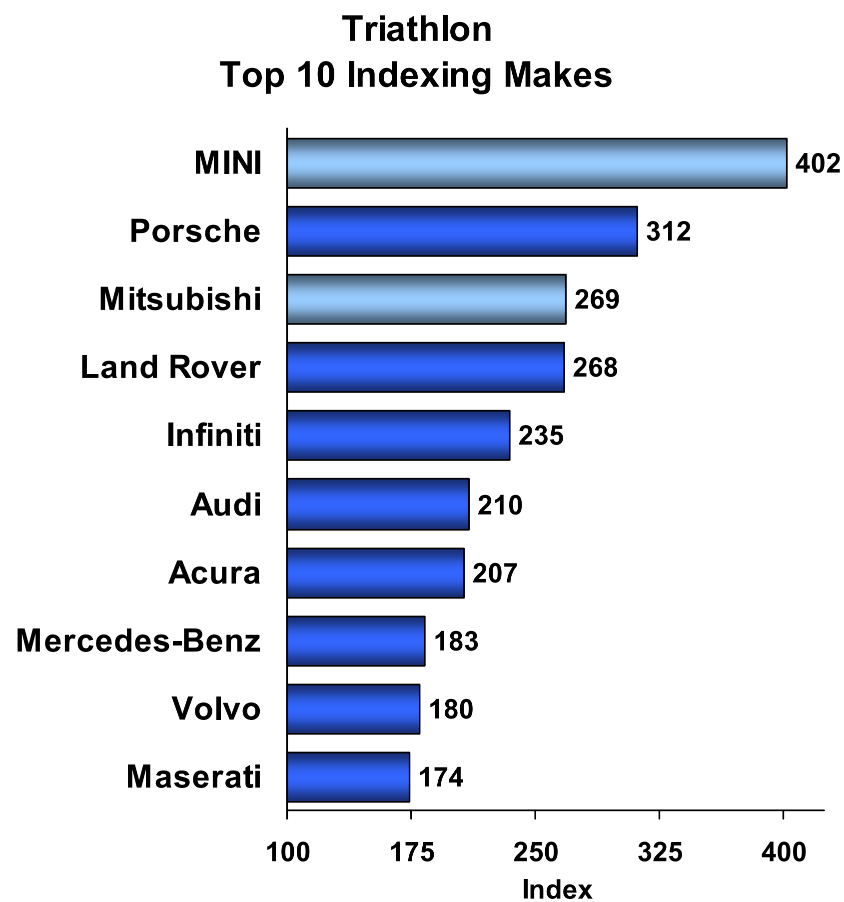
Magazine readership still remains high



Source: 2002-2009 Power Auto Offline Media Reports
# of Magazines Read in Last 6 Months (including Sunday Supplements)

New activities questions provide ways to target premium drivers

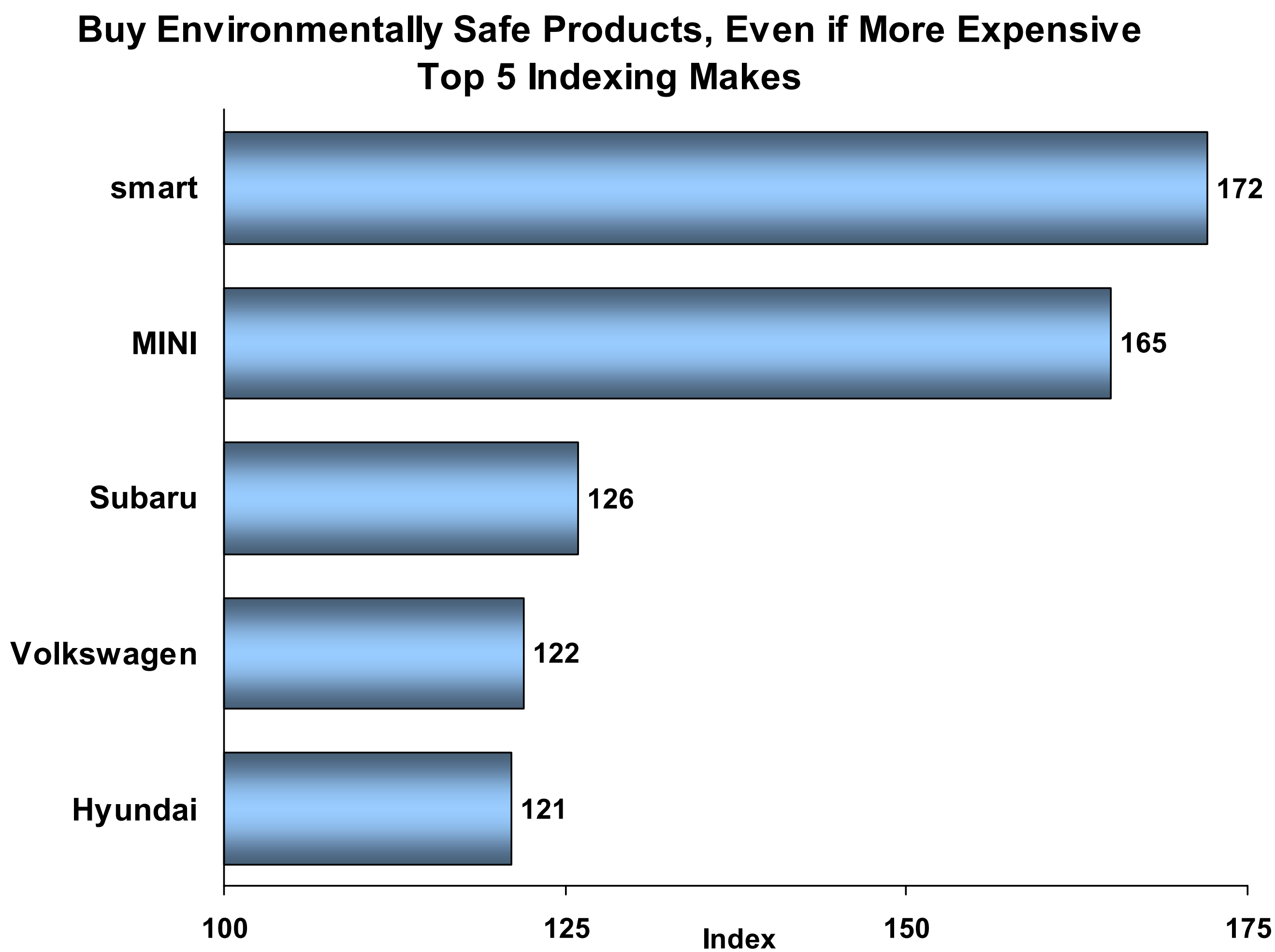




Source: 2009 Power Auto Offline Media Report, Summer
Played/Participated Frequently/Occasionally

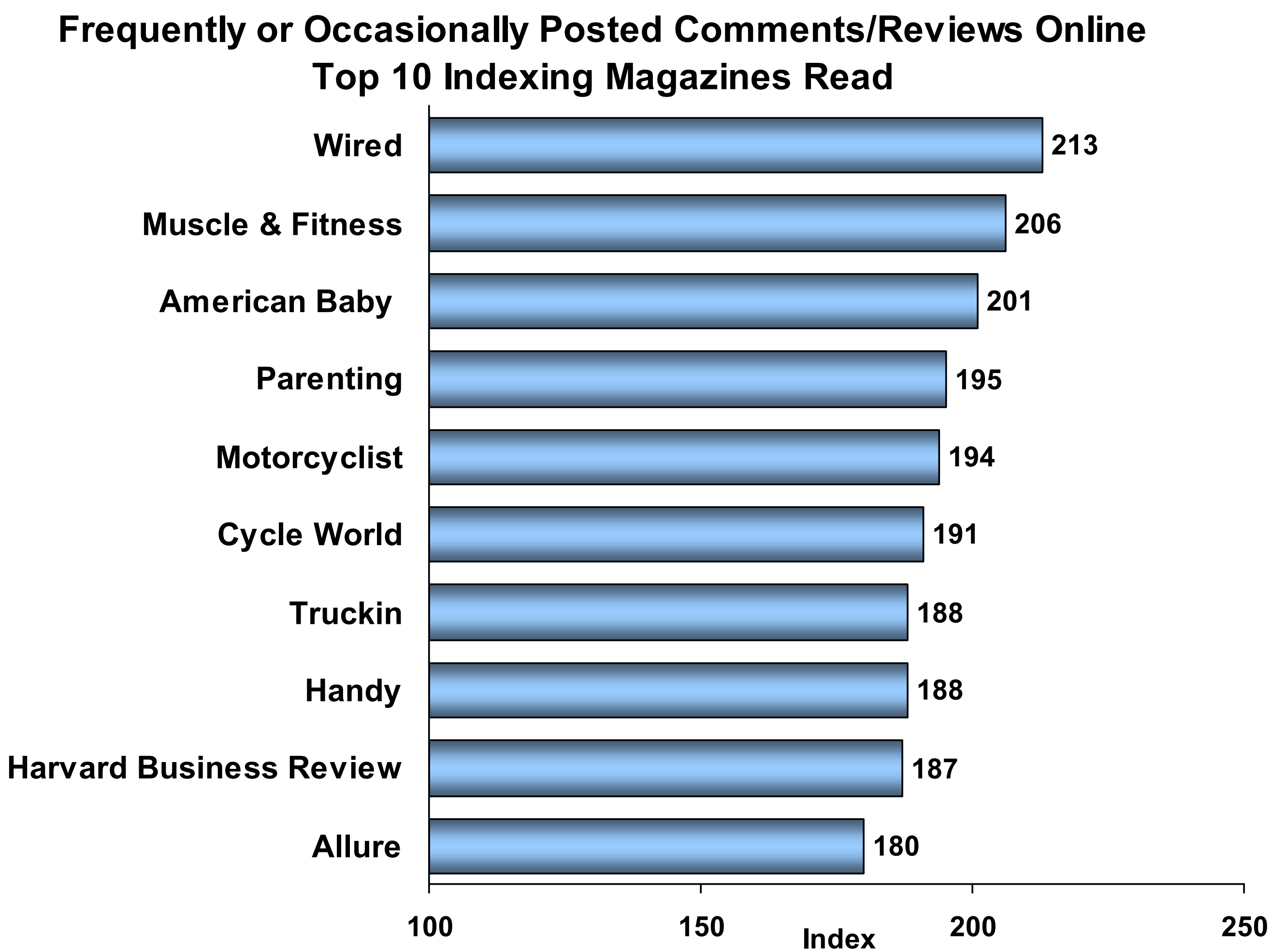
= Premium Make

New environmental questions provide ways to target green drivers



Source: 2009 Power Auto Offline Media Report, Summer
Agree Somewhat/Mostly

New consumer-generated content question shows the print readership of bloggers



Source: 2009 Power Auto Offline Media Report, Summer
Respondents who marked Frequently (daily or nearly every day) or Occasionally (a few times a week)

The Importance of Consideration

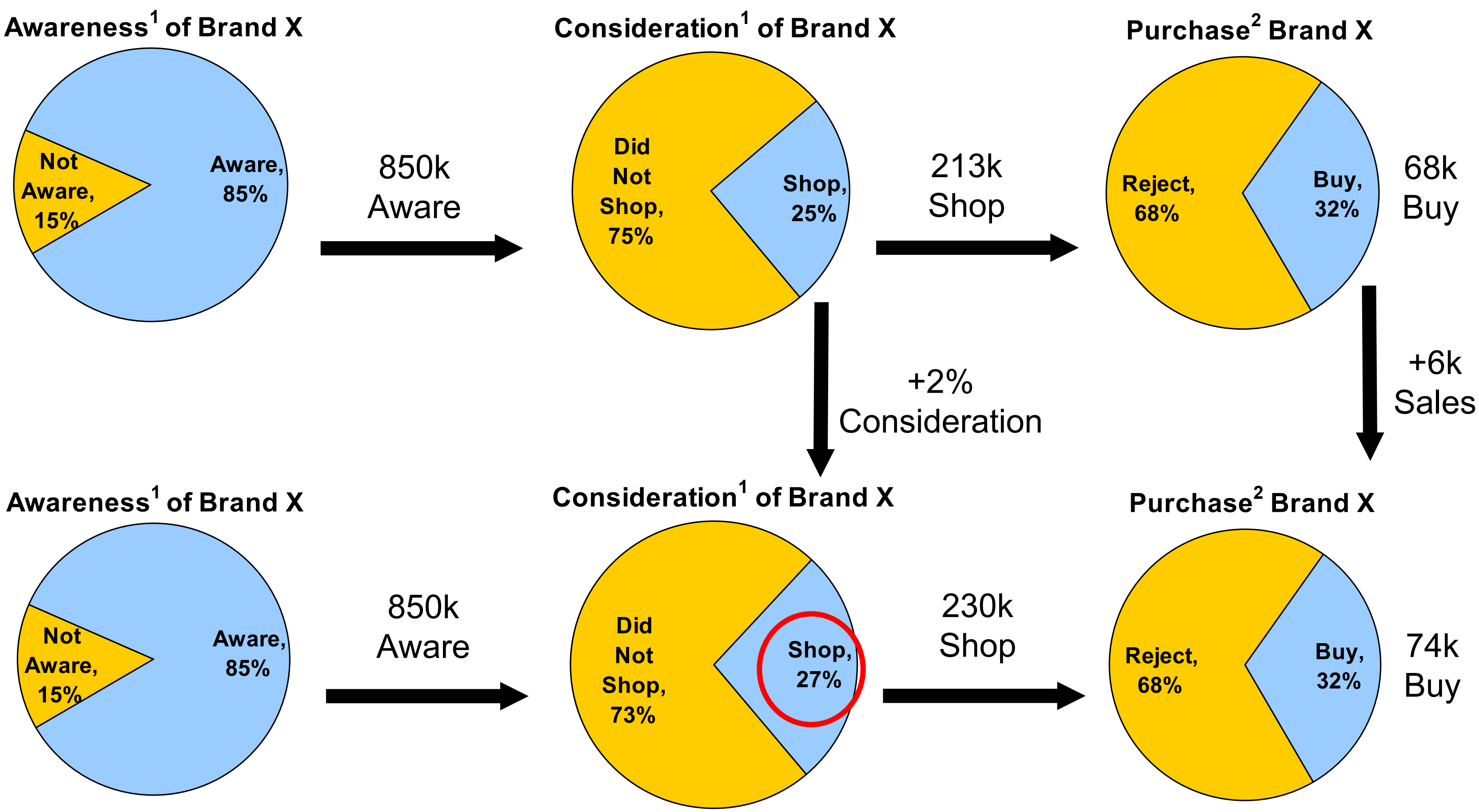
The importance of consideration

- In a recessionary market, automotive marketers have focused on converting in-market shoppers.
- As the market restructures, it is critical to focus on consideration and model awareness to increase sales.

Small improvements in consideration can translate into big gains in vehicle sales

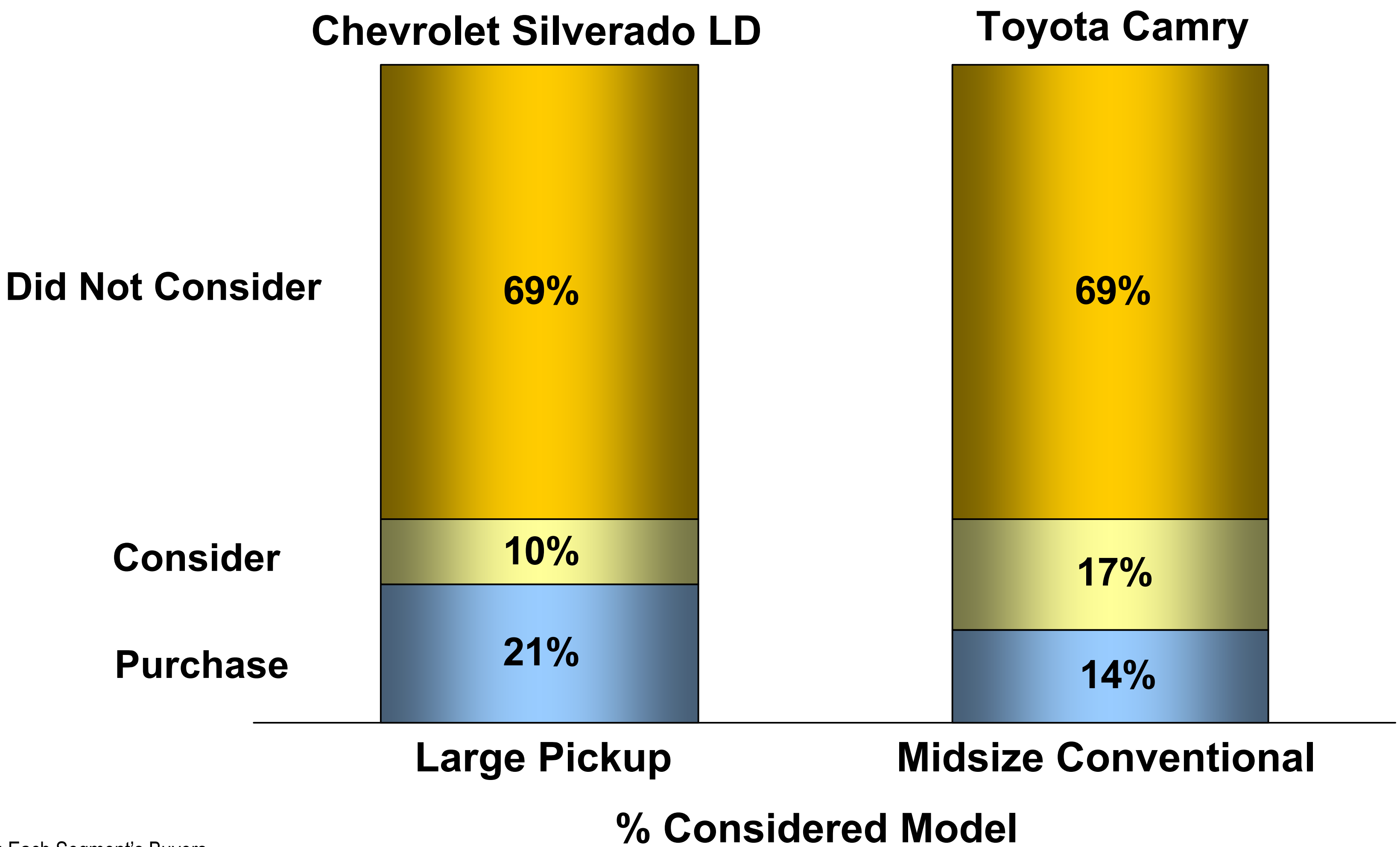
New-Vehicle Shopper

Example: 1M Monthly Industry Sales



[1] Avoider Study
[2] Escaped Shopper Study

Even the best selling vehicles are avoided by the majority of consumers



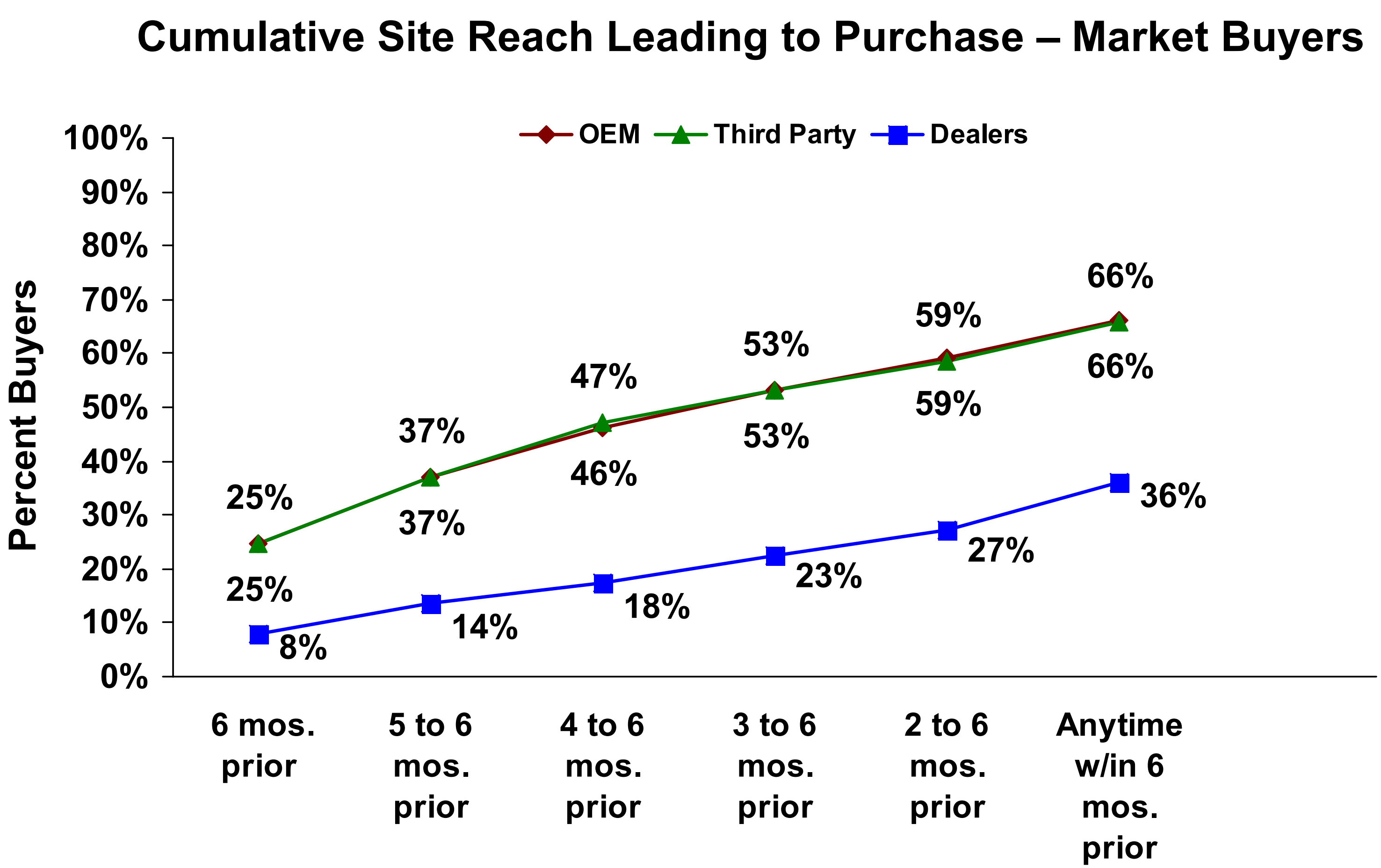
Base: Each Segment's Buyers
Source: Escaped Shopper Study

Top 6 selling models and their consideration

Top 6 Selling Models and their Consideration		
New Vehicle	**2009 Sales YTD**	**% Considered**
Toyota Camry	228,154	31%
Honda Accord	200,543	34%
Honda Civic	191,790	32%
Toyota Corolla	174,625	22%
Chevrolet Silverado LD	167,990	31%
Ford F-150	156,928	32%

Base: Each Segment's Buyers
Source: Escaped Shopper Study; JDPA Sales Report, August 2009

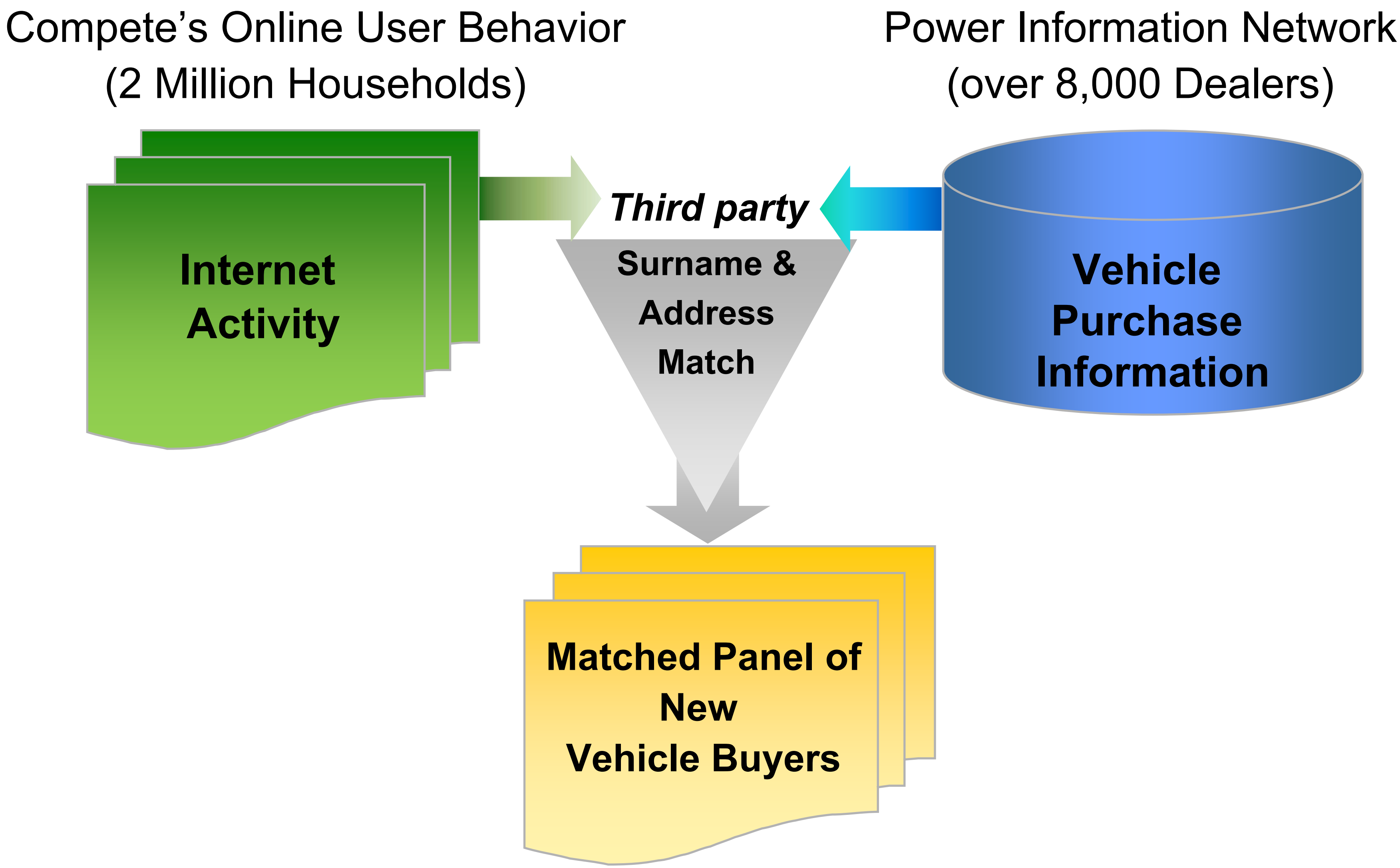
You need to get on the consideration list before shopping starts



Source: 2009 Web Site Performance Tools Wave 1

Auto Buyer Clickstream Platform

The Technology to Identify Buyers



Auto Buyer Clickstream Platform: Products

Web Site Performance Tools

Online Media Planning Tools

Online behavior of buyers

New vehicle purchase occurs

Online behavior of prospects

Web Site Performance

Examination of tools being used by buyers
Within the 6 Months Prior to Purchase

Auto Endemic sites and OEM sites

History of in-market behavior closely examining tools available

In-Market Buyer Behavior

Leverage the Online Behavior of Buyers
Within the 6 Months Prior to Purchase

Endemic
OEM
Portals
Lifestyle

History of in-market behavior
Over 10,000 Sites

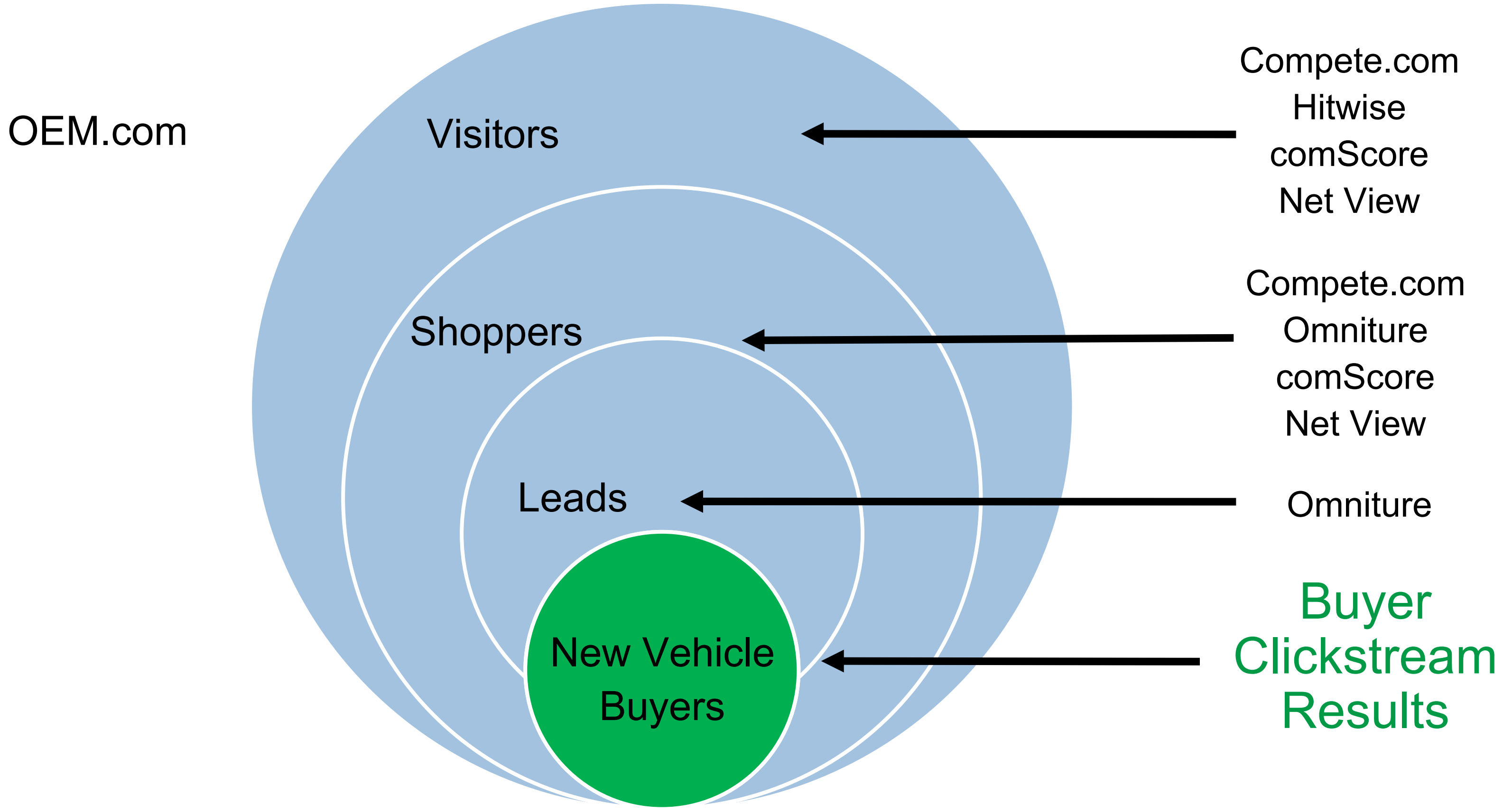
Prospects Current Behavior

Get Your Brand or Web site on Their List Before They Start Shopping

Endemic
OEM
Portals
Lifestyle

Current Behavior on Over 7,000 Sites

OEM Web Site Performance



compete | a tns media company

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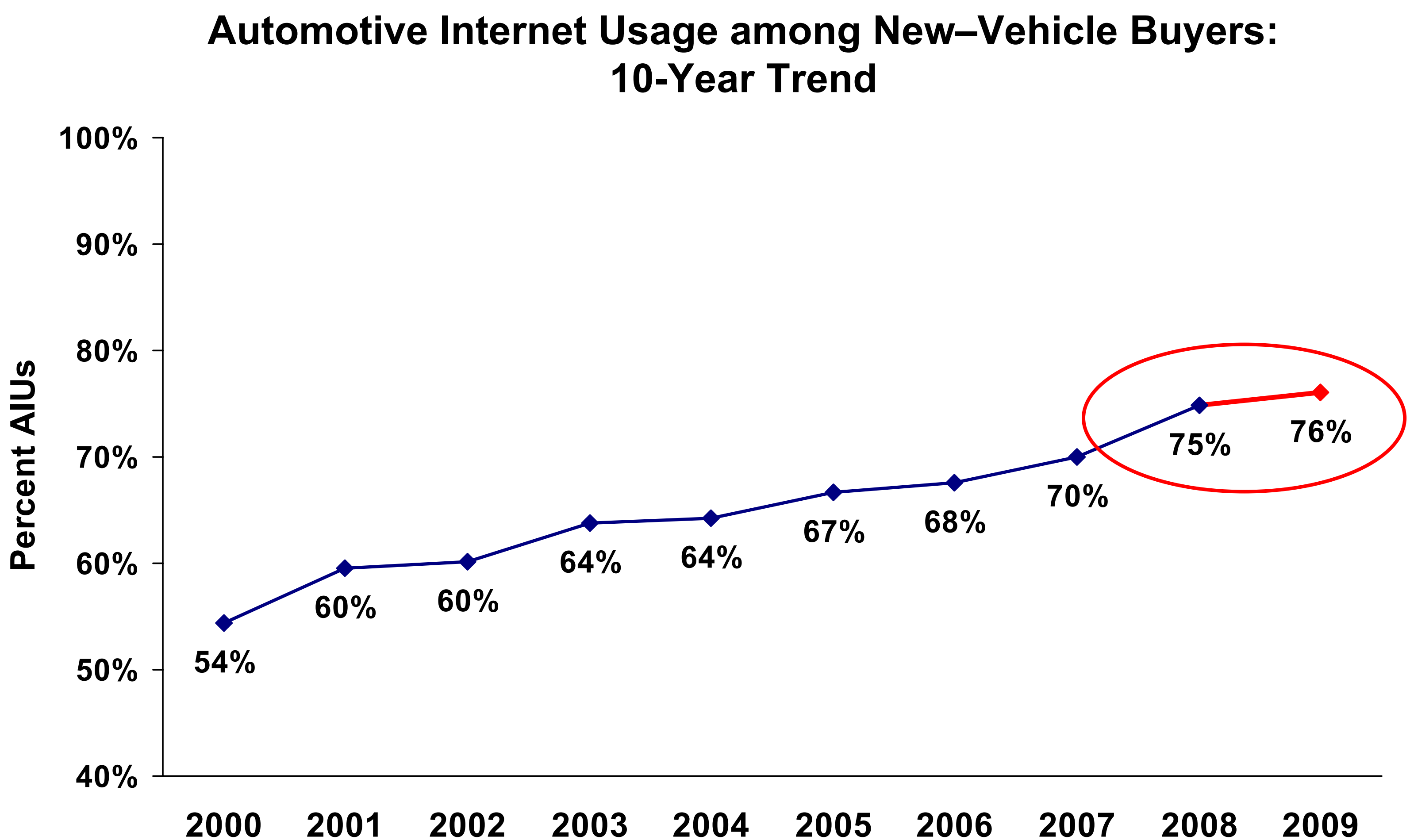
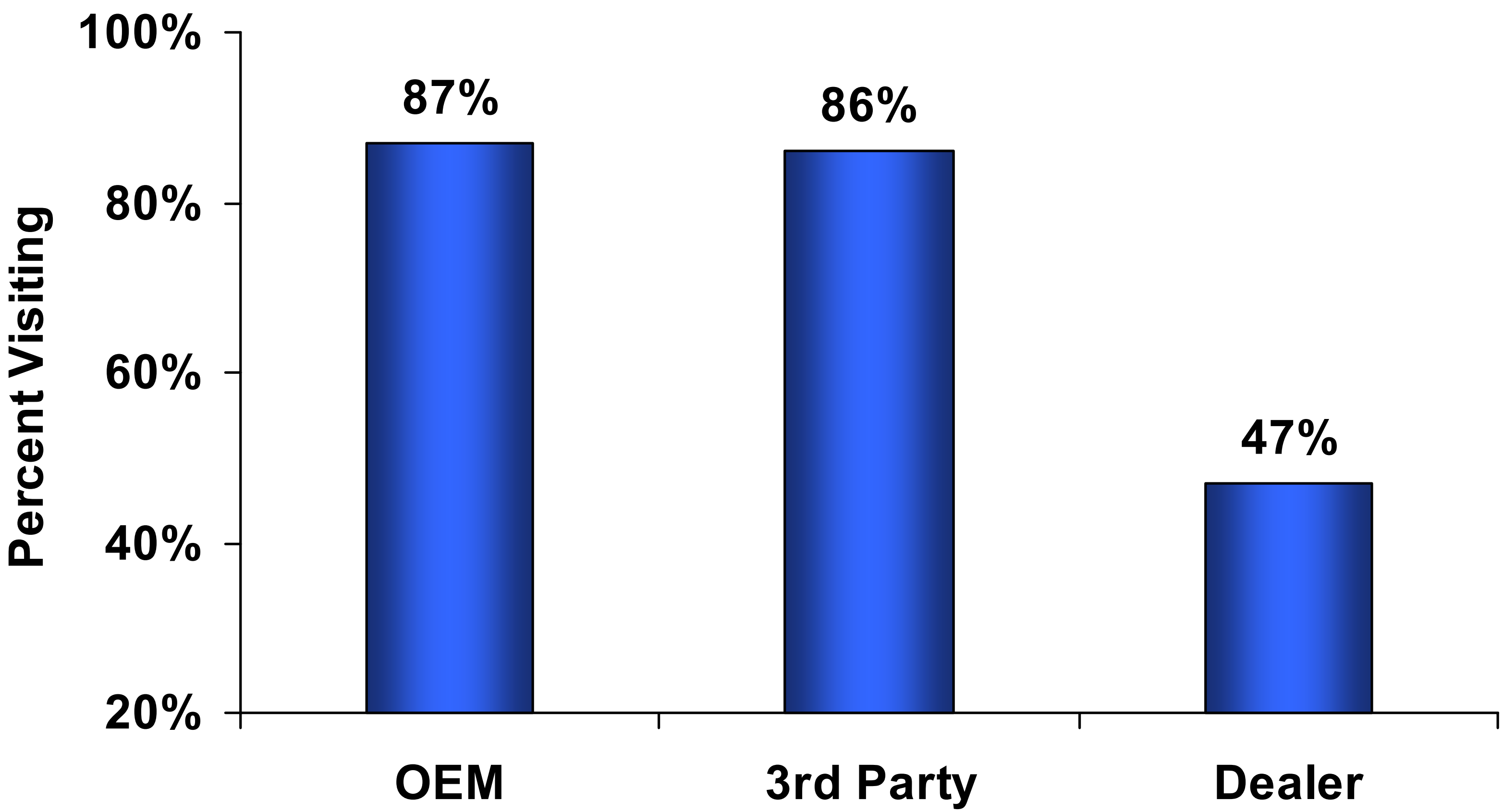
The Internet impacts automotive shopping more than ever



Note: 2000-2008 data from J.D. Power and Associates New Autoshopper.com Studies. 2009 data from 2009 Web Site Performance Tools Wave 1

Almost 9 in 10 AIUs will visit at least one OEM and one Third Party Site before buying. Almost half will visit a Dealer site.

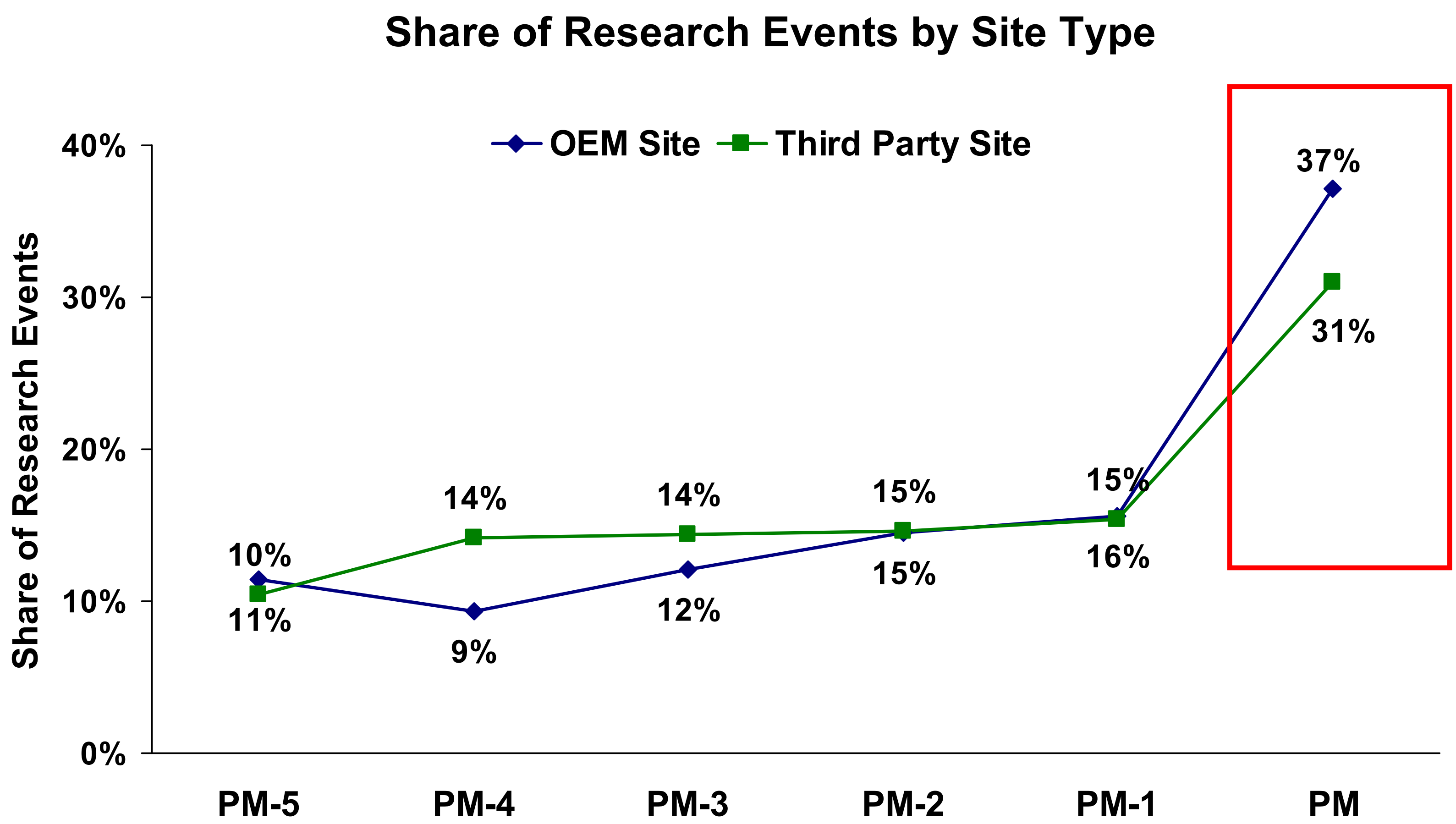
Types of Sites Visited - During the 6 months prior to purchase



Based to AIUs

Source: 2009 Web Site Performance Tools Wave 1

Buyers complete a third of their OEM and Third Party Site research activity in the month of purchase

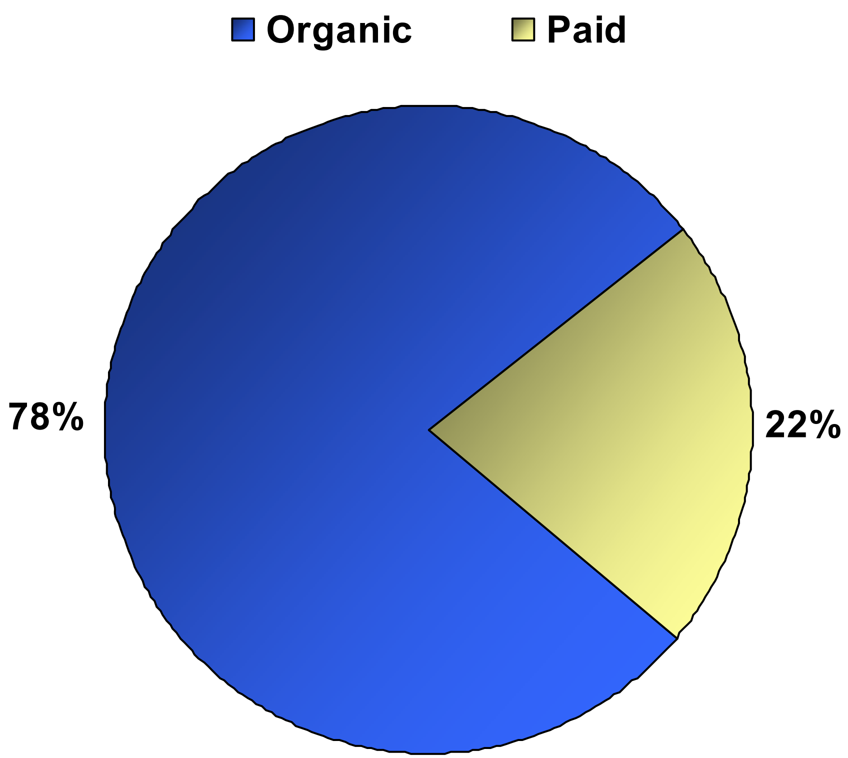


Normalized to event months

Source: 2009 Web Site Performance Tools Wave 1

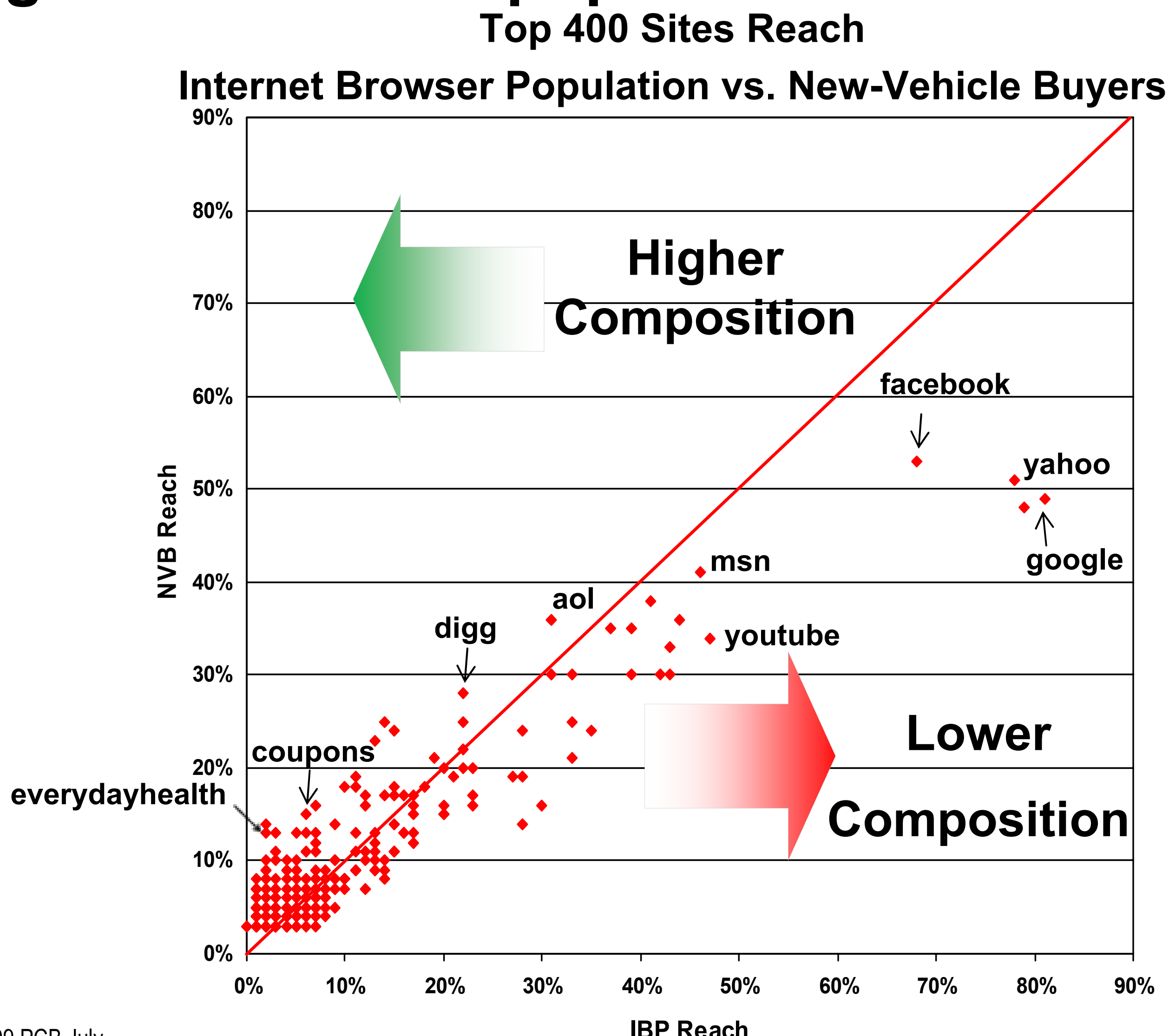
Only 22% of all AIUs searches leading to an OEM and/or Third Party Sites come from paid search

Share of Search Sessions Resulting in Traffic to any OEM and/or 3rd Party Site - Market



Based to AIUs who used search: total time period (6 months)
Source: 2009 Web Site Performance Tools Wave 1

New vehicle buyers visit sites at a different rate than the general Internet population



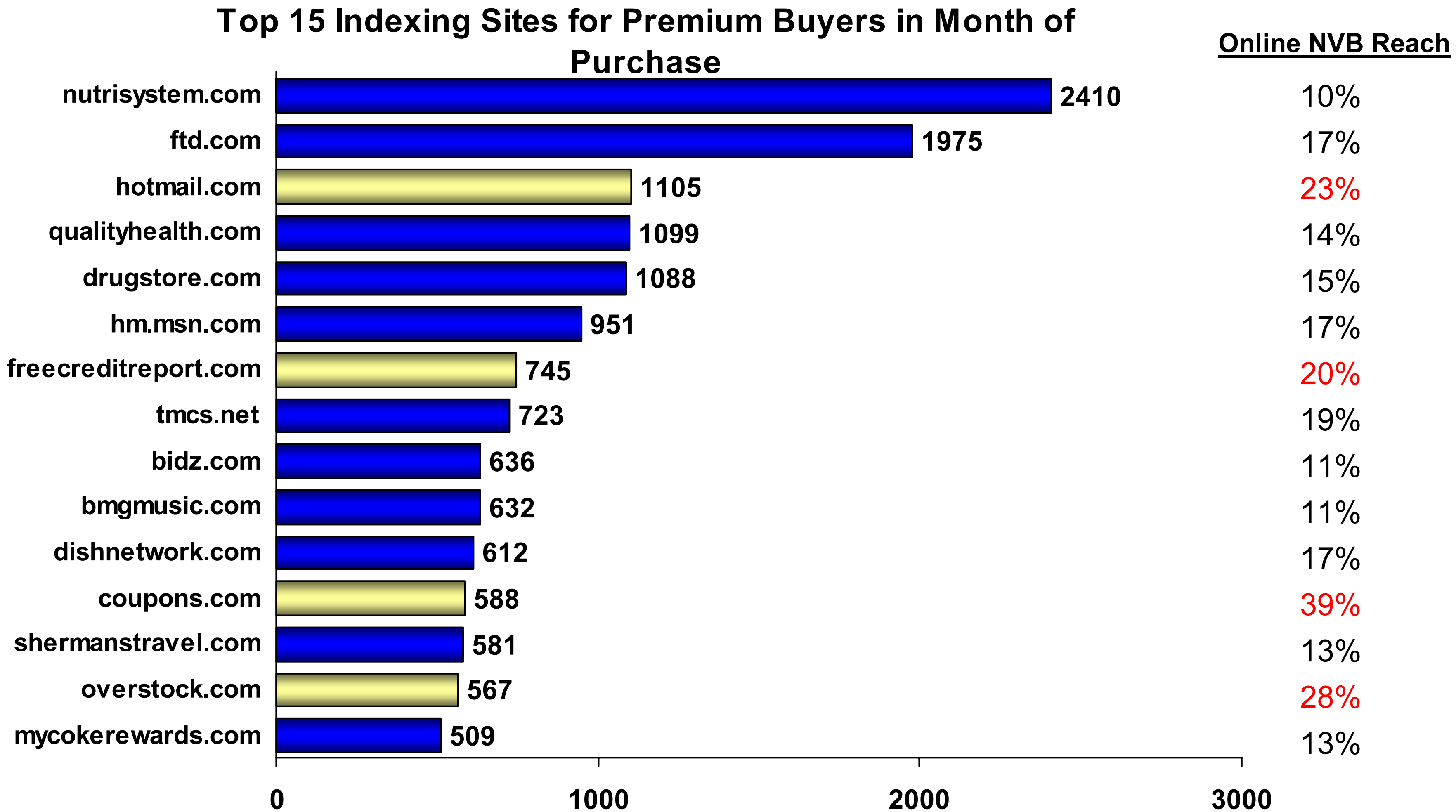
Source: 2009 PCB July

Comparing In-Market Behavior and Prospects' Behavior Reveals Opportunities

Web Site	In-Market Buyer Behavior: (PM = Month of Purchase) PM-5	PM-4	PM-3	PM-2	PM-1	PM	Web Site Performance Tools 6 Mos Total	Prospects Current Behavior 2009 July
OEM Web Sites								
chevrolet.com	2%	2%	3%	3%	2%	7%	13%	2%
fordvehicles.com	5%	4%	4%	6%	5%	7%	20%	1%
automobiles.honda.com	2%	2%	2%	3%	3%	6%	16%	1%
toyota.com	2%	2%	3%	3%	3%	6%	15%	1%
Third Party Web Sites								
autotrader.com	5%	4%	4%	4%	5%	8%	26%	2%
edmunds.com	4%	5%	6%	7%	6%	11%	32%	1%
kbb.com	3%	4%	5%	5%	5%	11%	29%	2%
Lifestyle Web Sites								
cnn.com	18%	20%	20%	18%	18%	16%	na	12%
Facebook	17%	17%	17%	18%	20%	19%	na	48%
People.com	6%	5%	6%	5%	6%	6%	na	4%
SI Digital	4%	5%	5%	5%	5%	4%	na	3%

Source: 2009 Web Site Performance Tools Wave 1, 2009 PCB July, 2009 IMBB Wave 1

Niche Web sites have a high composition among Premium Buyers



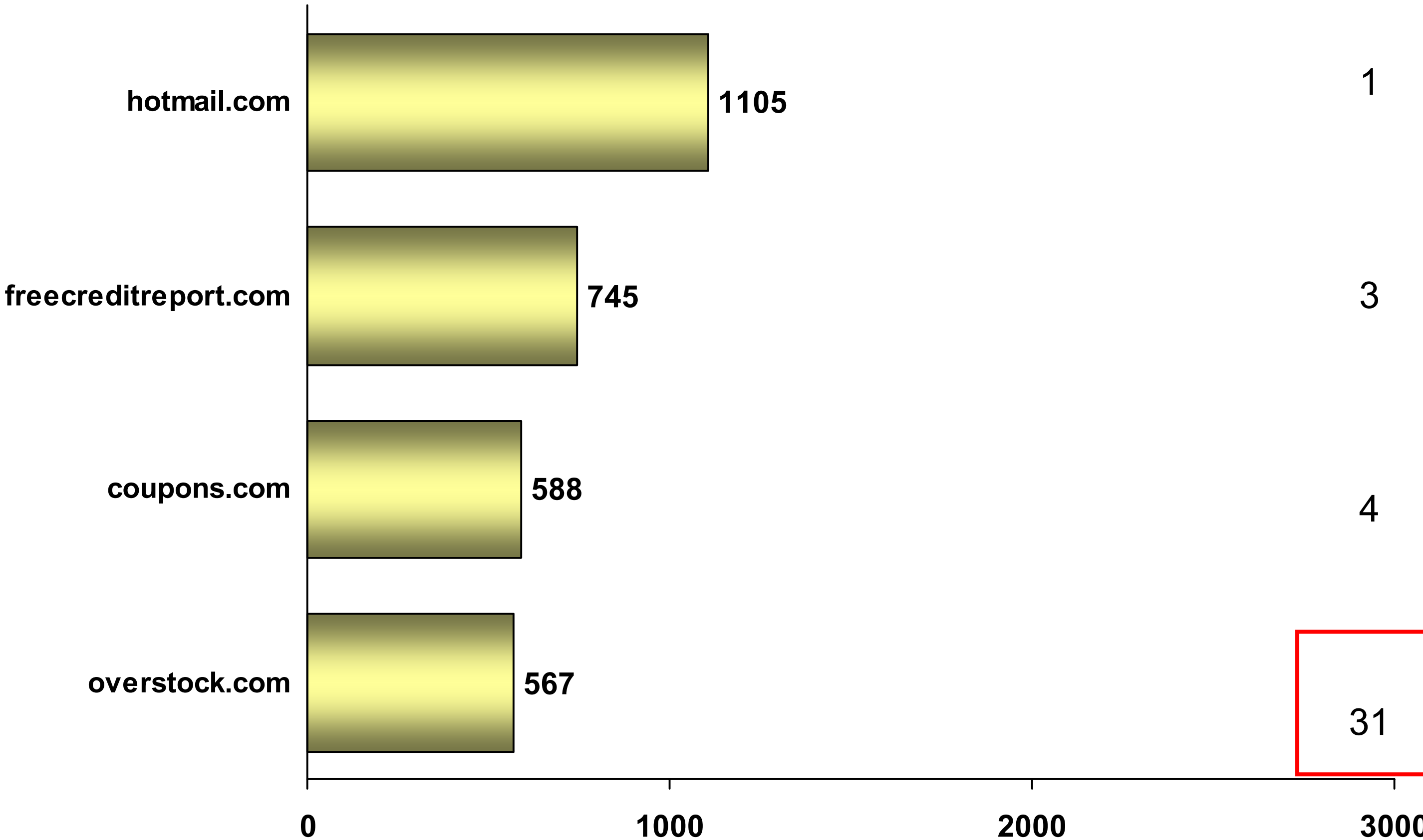
Based to online new-vehicle buyers within the Segment
Minimum 10% Online NVB Reach, and “Ad Supported”

Source: 2009 IMBB Wave 1

Yellow-highlighted bars combine both high online reach with a high segment index

Overstock.com offers promising engagement metrics for Premium Buyers

Top Indexing Sites with >10% Online NVB Reach in Purchase Month - Premium



	Minutes per Segment Buyer	Bounce Rate
hotmail.com	1	60%
freecreditreport.com	3	58%
coupons.com	4	12%
overstock.com	31	19%

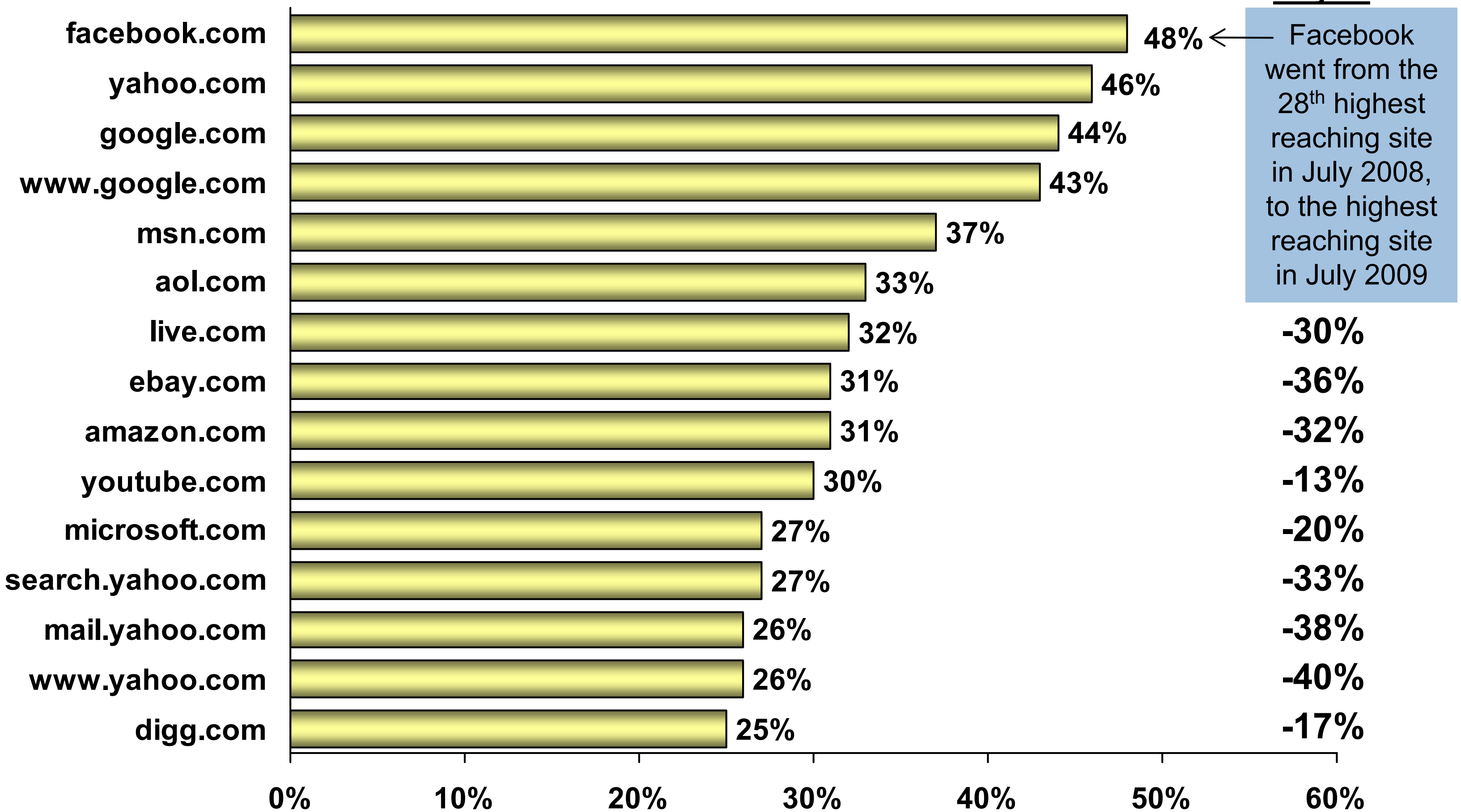
Based to online new-vehicle buyers within the Segment

Source: 2009 IMBB Wave 1

The Internet is increasingly fragmented but Facebook has commanded more and more reach

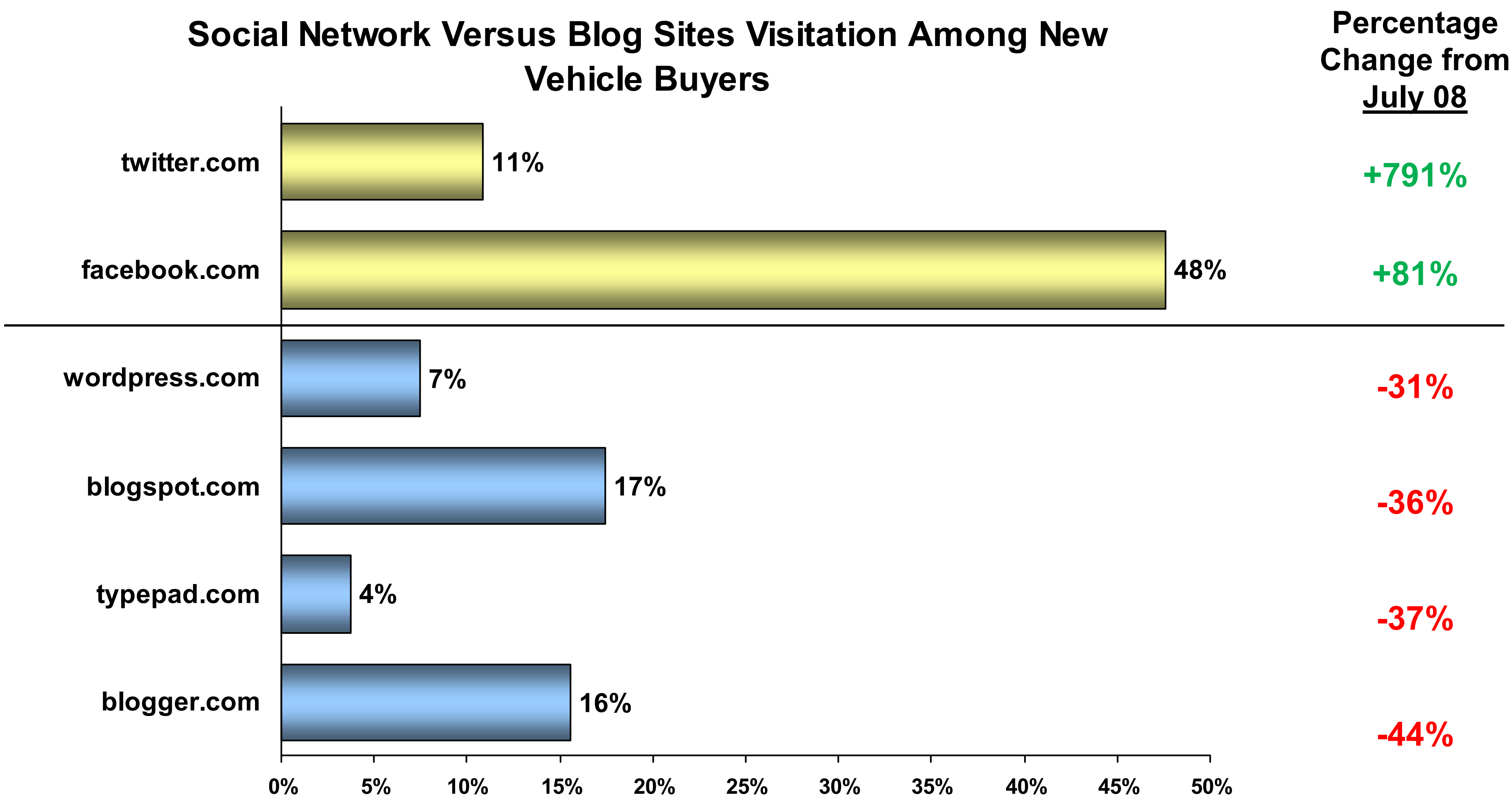
Top 15 Sites for New Vehicle Buyers

Percentage Change from <u>July 08</u>



Source: 2009 PCB July vs. 2008 PCB July
Based to total new-vehicle buyers

As social network sites increase dramatically in popularity, blogs decrease in visitation



Source: 2009 PCB July vs. 2008 PCB July
Based to total new-vehicle buyers

Word of Mouth *(Buzz)*

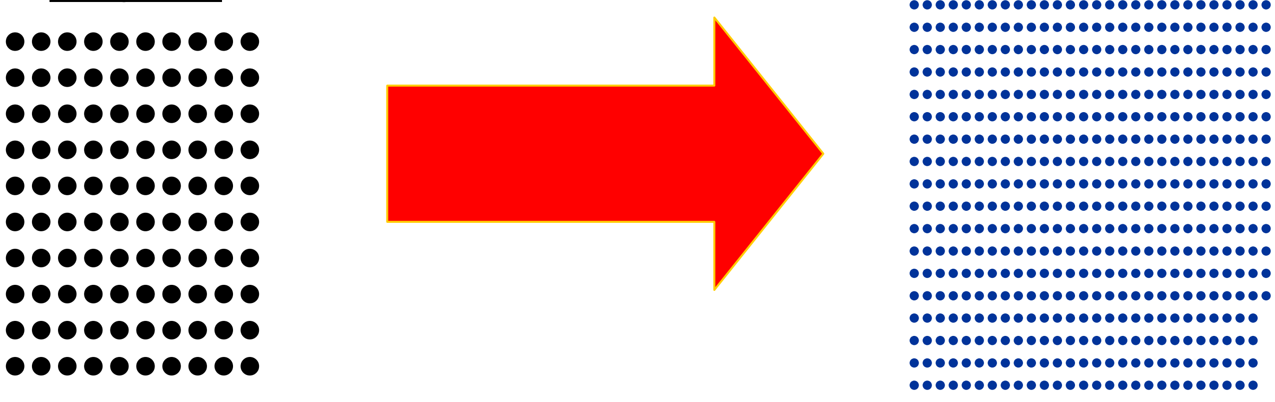
The Buzz Index

Calculated based on this question:

How many recommendations have you given regarding your experience with your new vehicle?

☐☐ *POSITIVE recommendations* ☐☐ *NEGATIVE recommendations*

100 Current <u>Buyers</u>



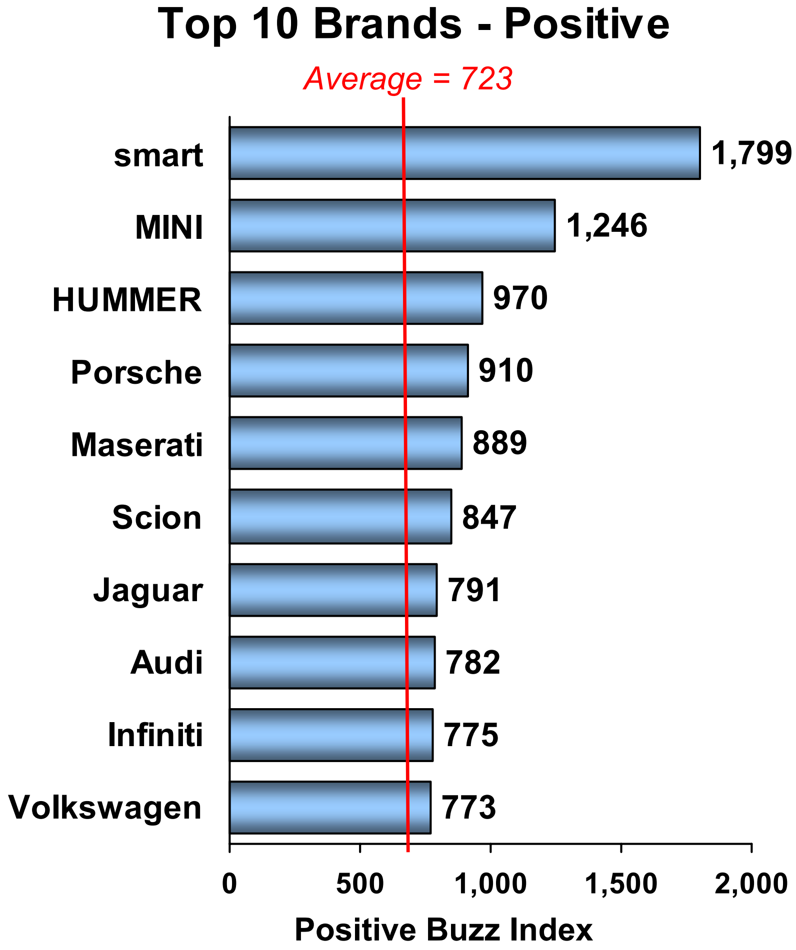
<u>100</u> current buyers gave <u>723</u> people *positive* recommendations about their vehicle

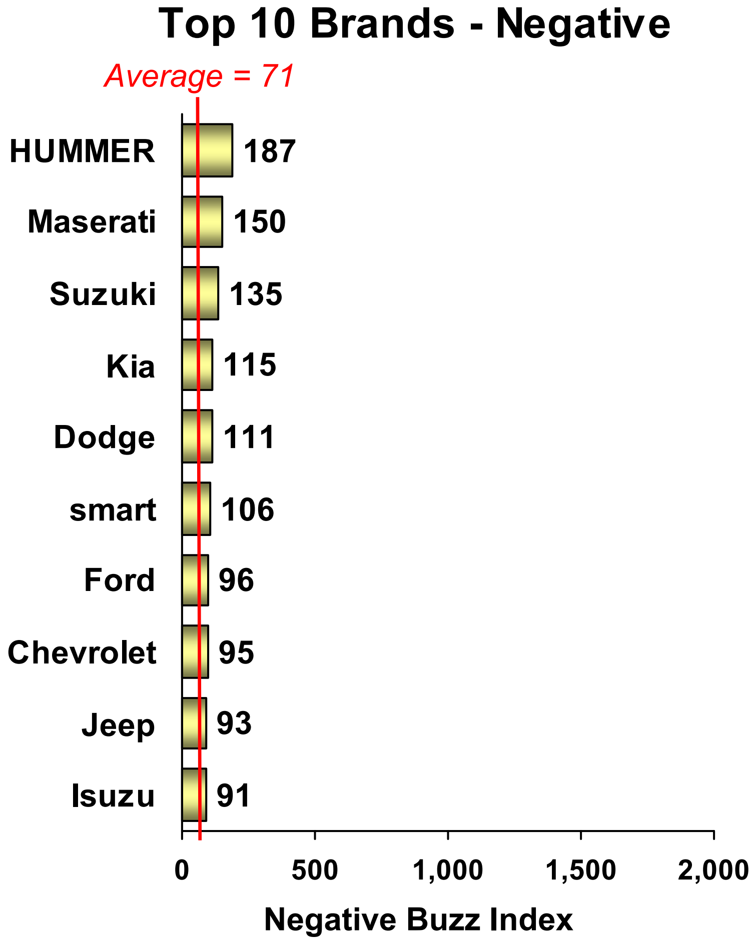
Buzz Index = 723

Source: 2009 Power Auto Offline Media Report, Summer

smart and MINI drivers create the most positive buzz about their new vehicles

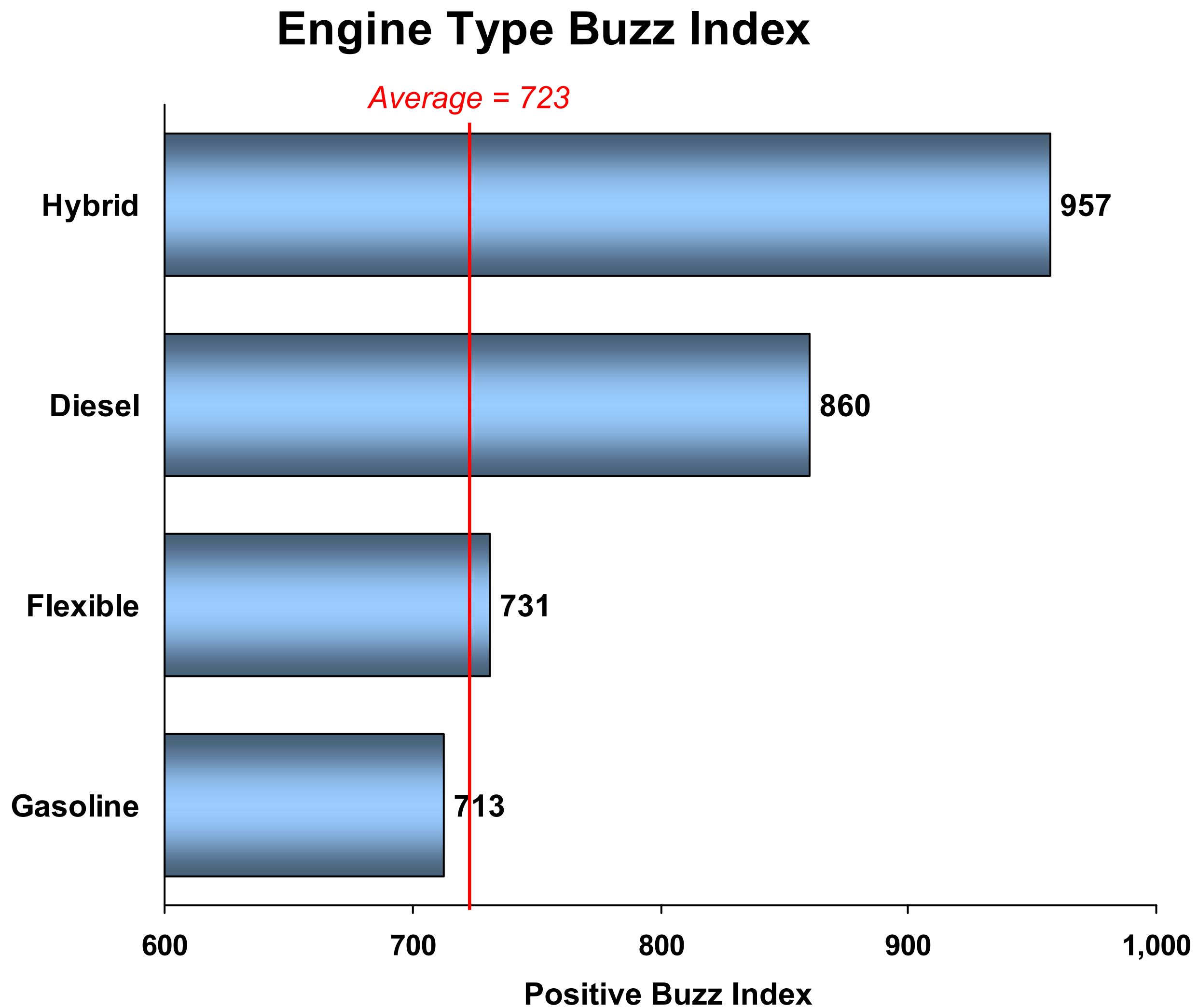
Buzz Index by Make





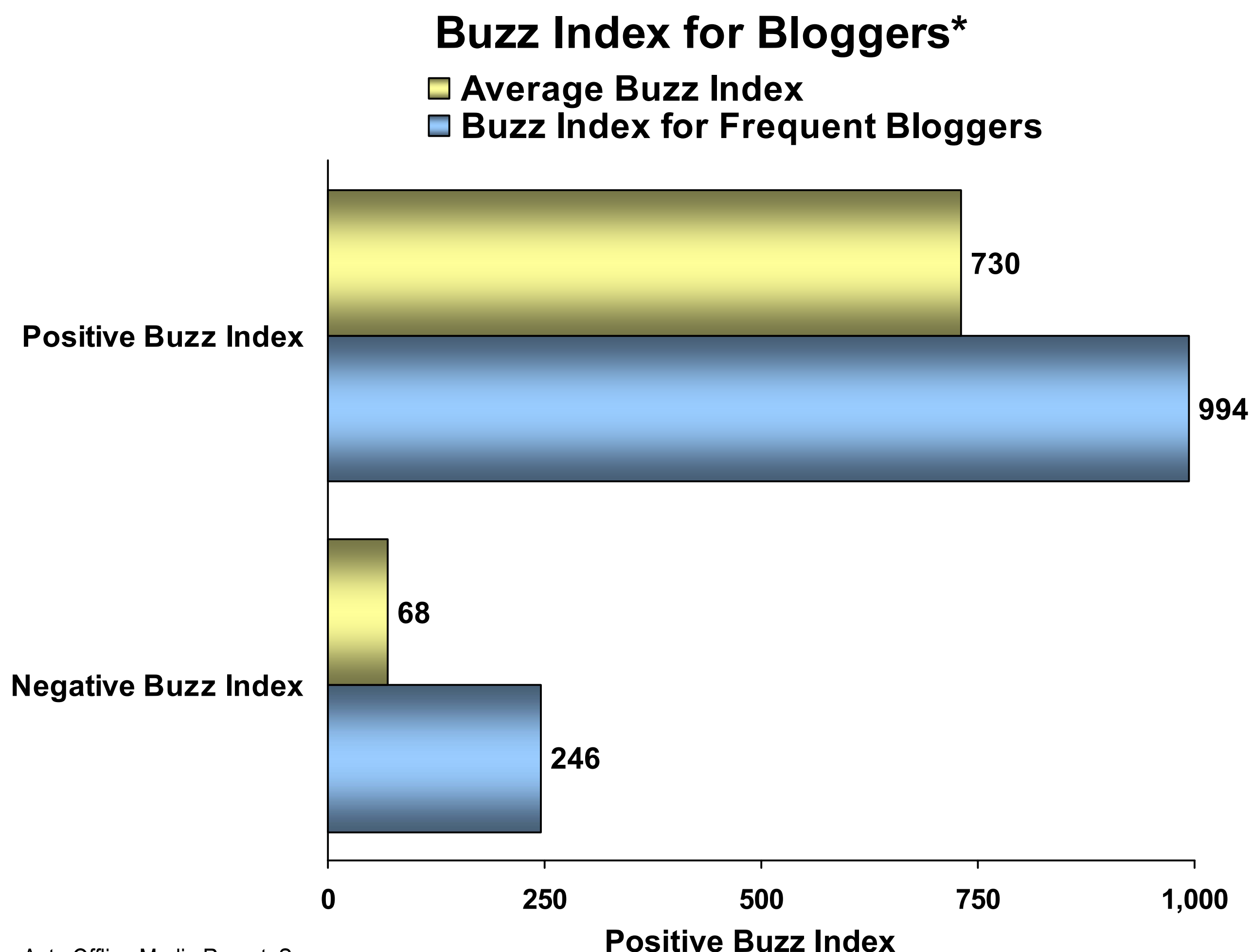
Source: 2009 Power Auto Offline Media Report, Summer

Hybrid drivers create the most positive buzz about their new vehicles



Source: 2009 Power Auto Offline Media Report, Summer

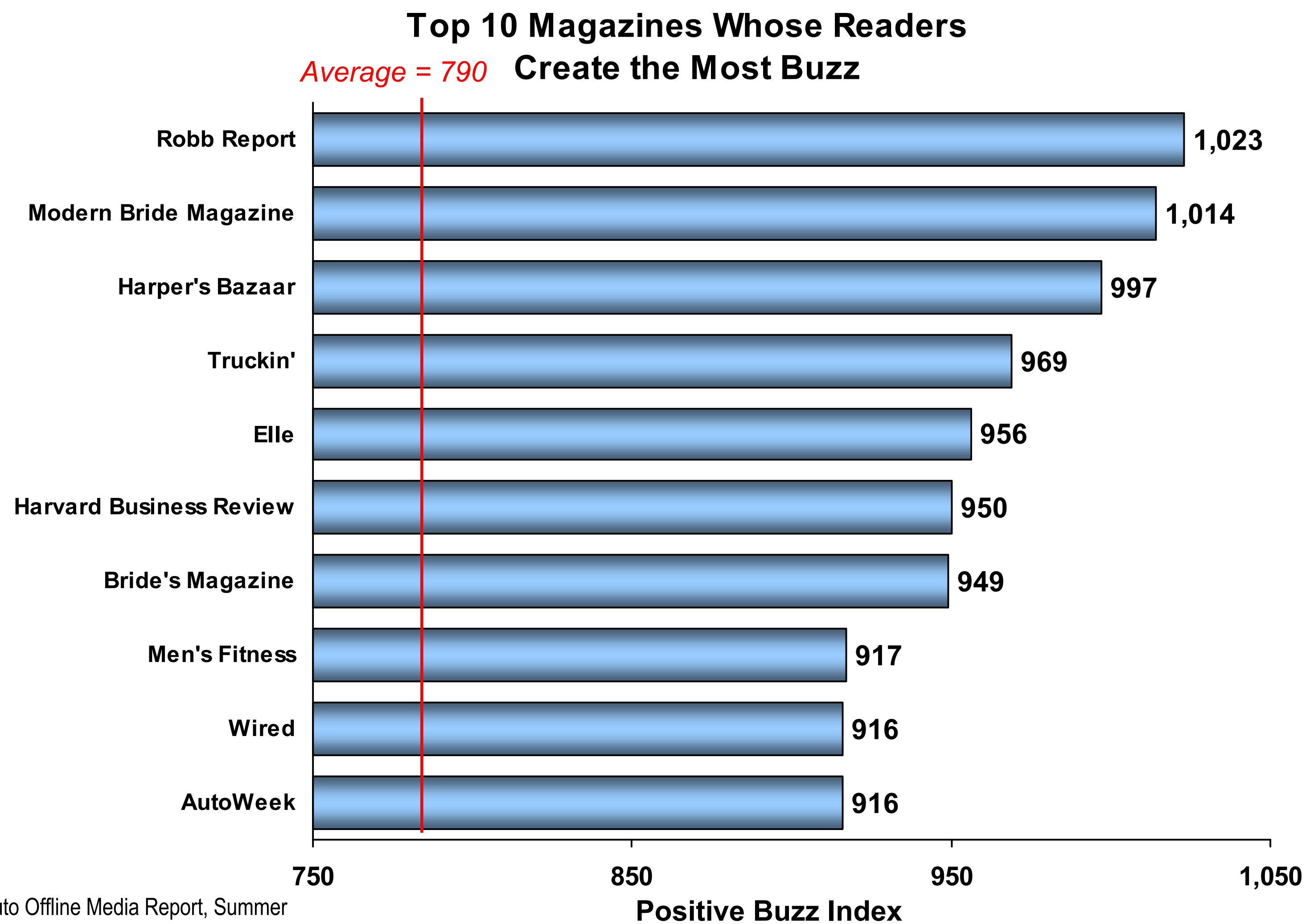
Those who frequently post comments or reviews online are more likely to buzz about their new vehicles than the average new vehicle driver



Source: 2009 Power Auto Offline Media Report, Summer

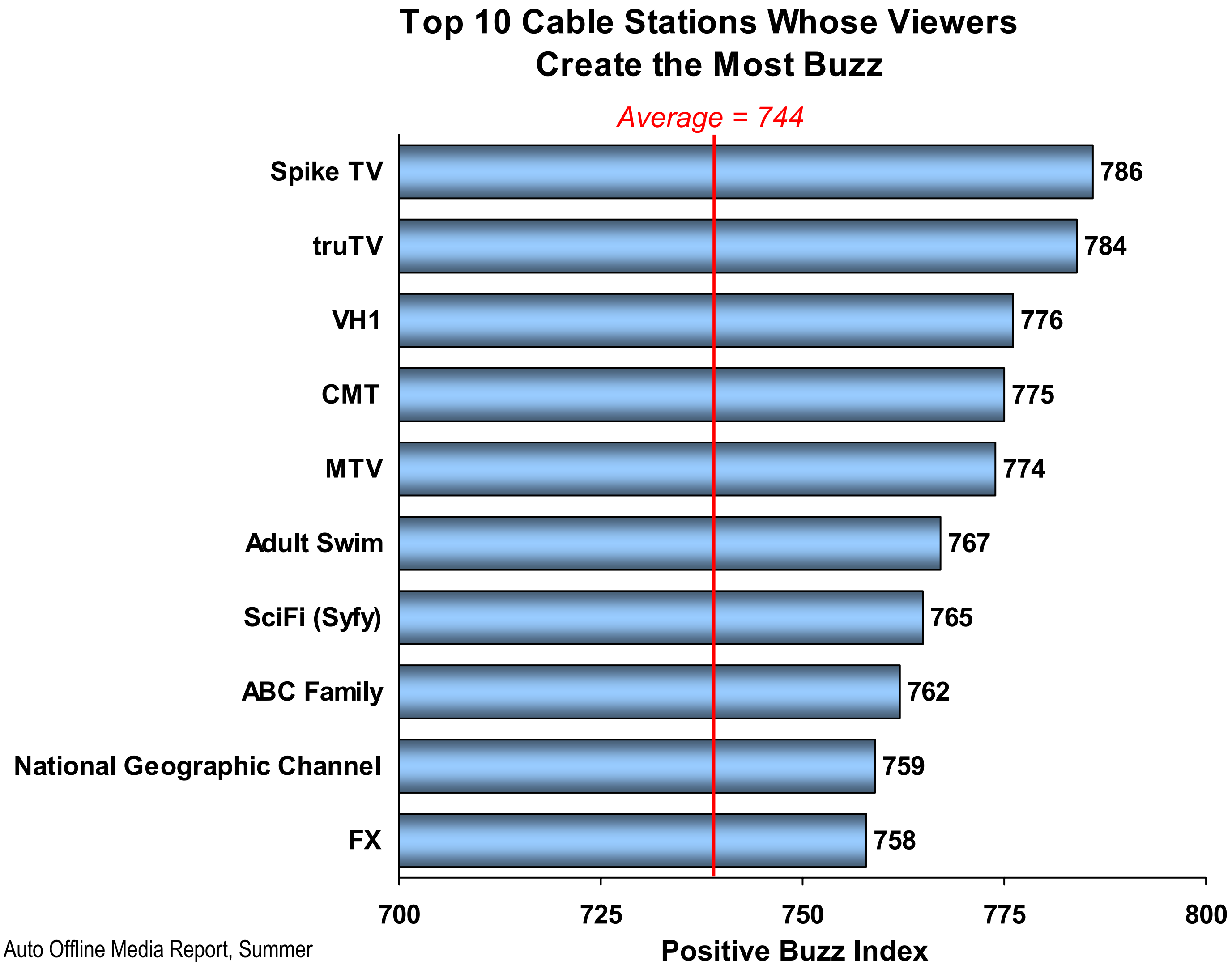
*Respondents that Frequently post comments or reviews online, Average based to those with Internet access

New vehicle drivers who read Robb Report create the most positive buzz



Source: 2009 Power Auto Offline Media Report, Summer
Respondents that read 4 out of 4 issues

Viewers of Spike TV and truTV create the most positive buzz



Source: 2009 Power Auto Offline Media Report, Summer
Respondents that watched cable in the past 7 days

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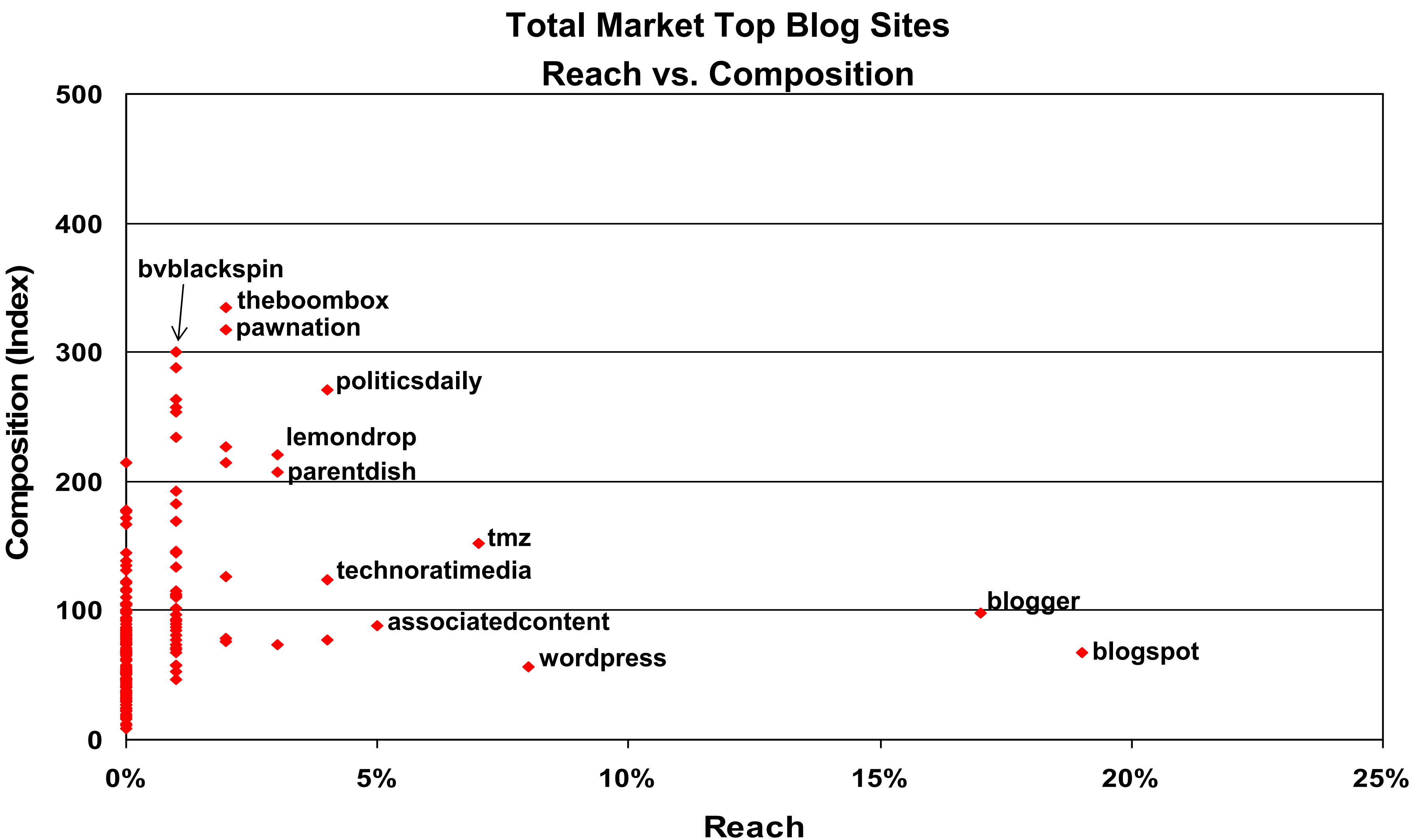
Web Intelligence

Insights on the Insight

Who is Saying What?

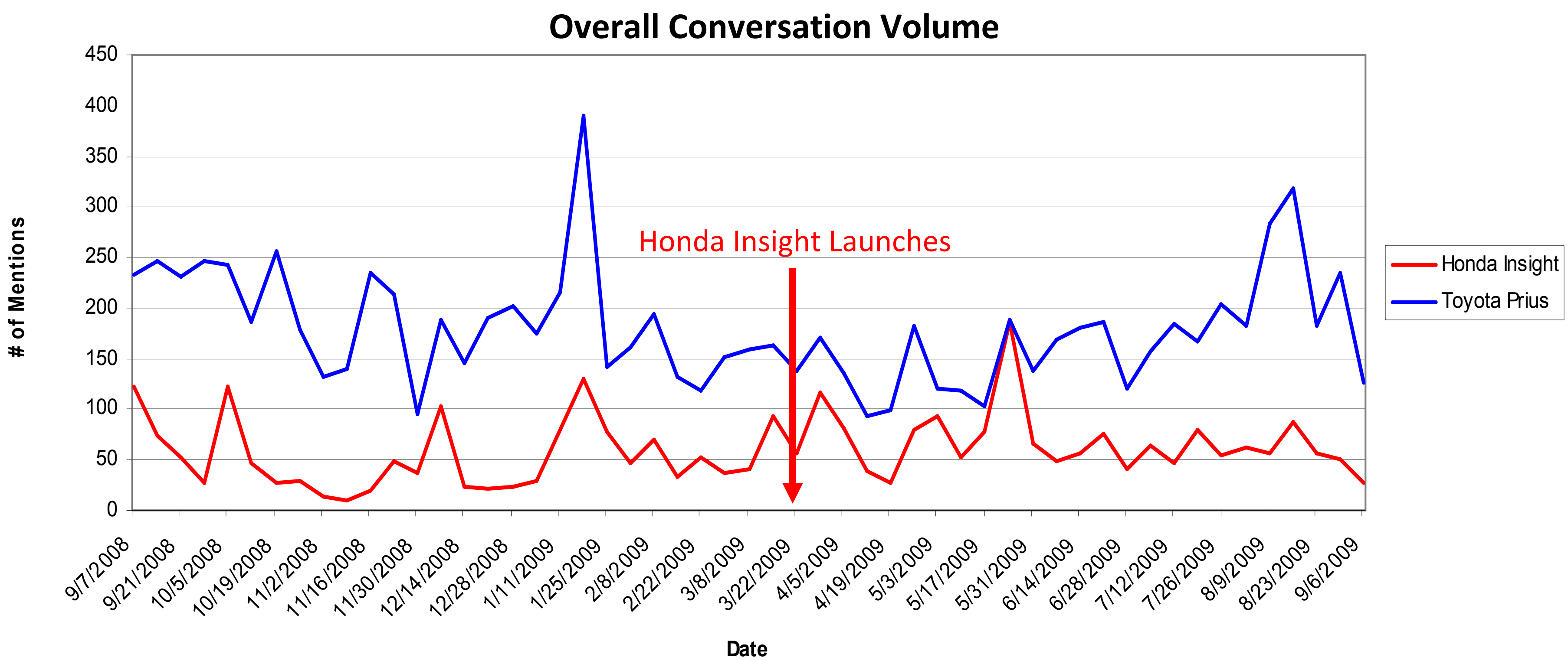
The McGraw-Hill Companies

Blogs…lots of car buyers but not all are created equal.



Source: PCB July 09
Based to online new-vehicle buyers

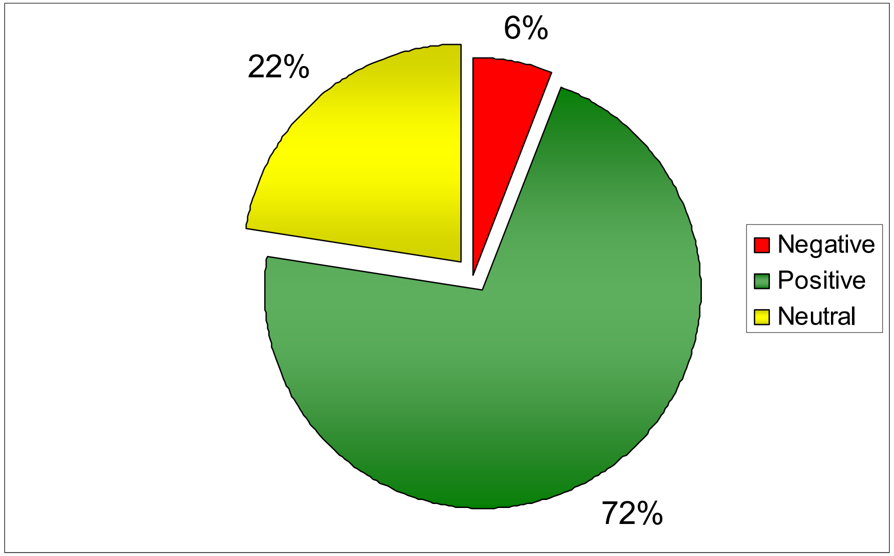
To-date, the Honda Insight has not generated nearly as much discussion as the Toyota Prius…even more so lately.



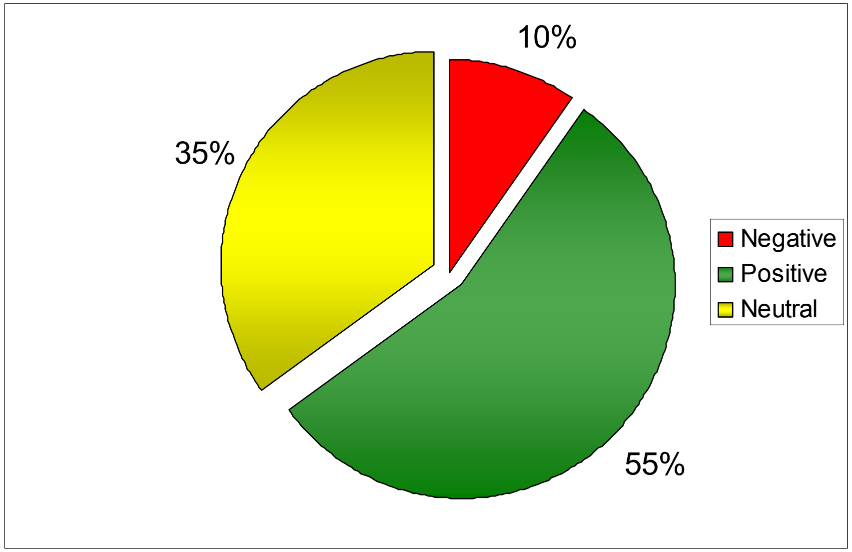
Source: J.D. Power Web Intelligence Division

However, consumer sentiment for the Insight compares favorably to the Toyota Prius.

Honda Insight



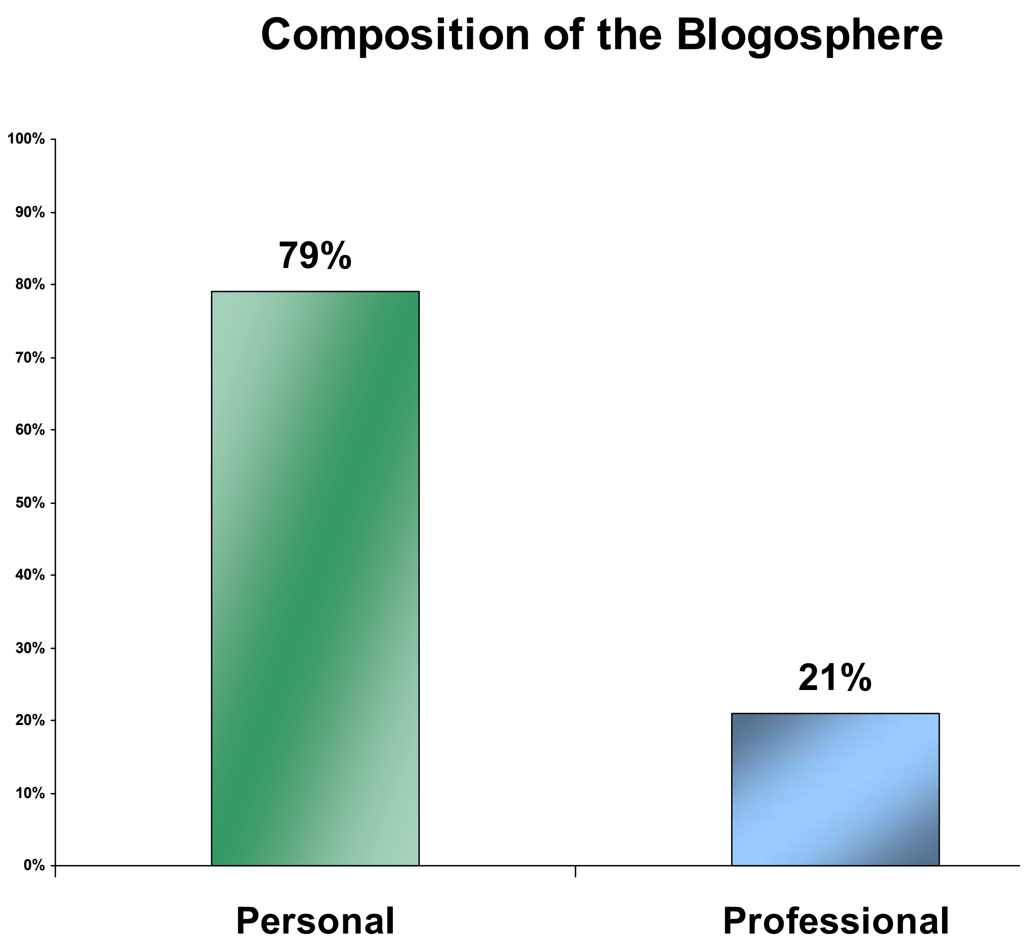
Toyota Prius



Source: J.D. Power Web Intelligence Division

There are blogs and then there are blogs…

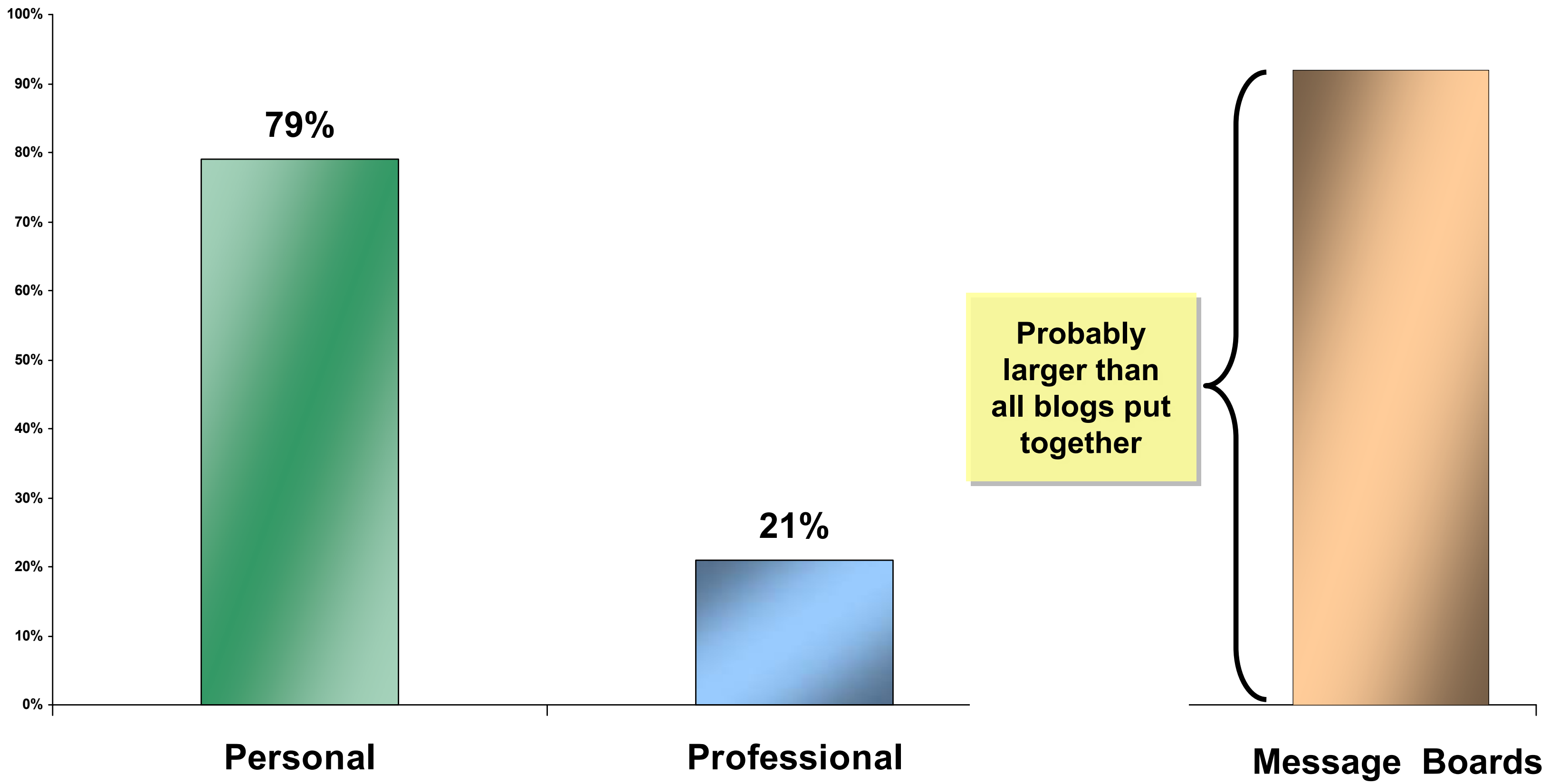
The truth is, the vast majority of all blogs are personal blogs, not the professional blogs you probably think about.



Source: Technorati "State of the Blogosphere", Dec 2008

In addition to blogs, message boards also represent another huge source of conversations that aren't always "visible".

Composition of the Blogosphere

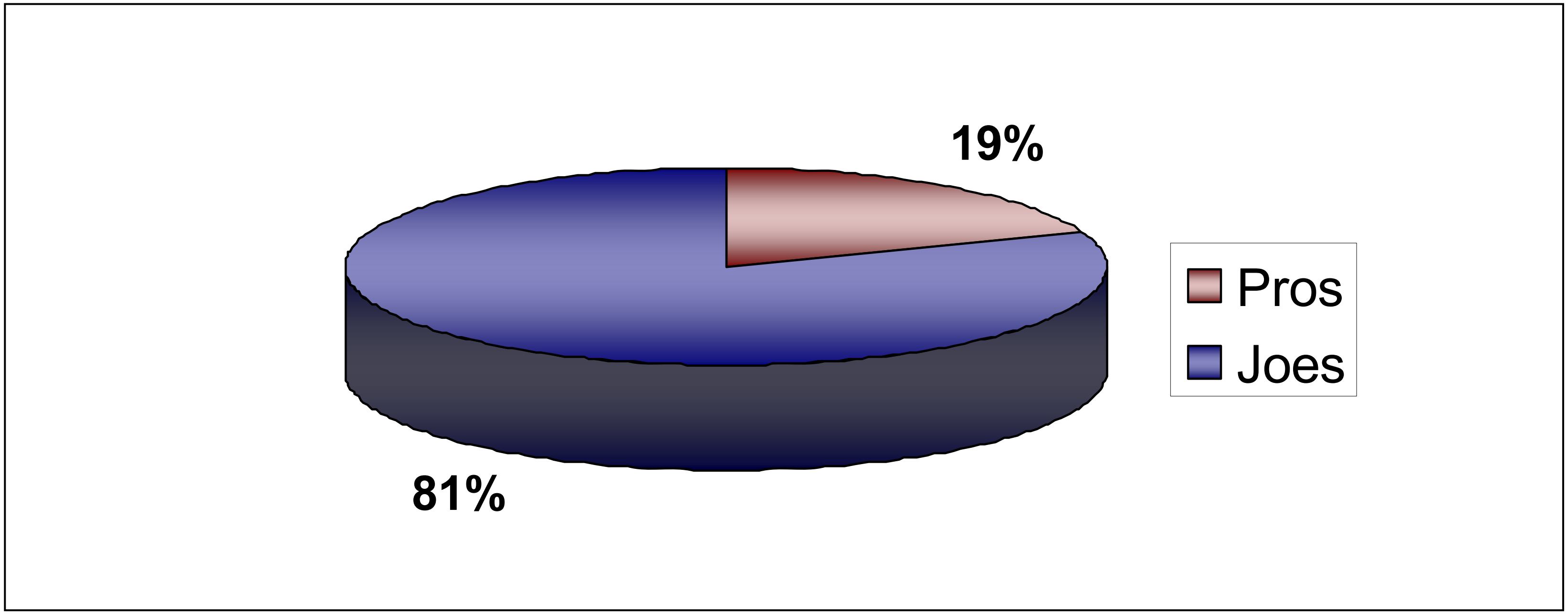


Source: Technorati "State of the Blogosphere", Dec 2008

Most of the volume of posts about the Insight comes from regular consumers… "Joes"

<u>**Honda Insight Posts**</u>

Pros vs. Joes



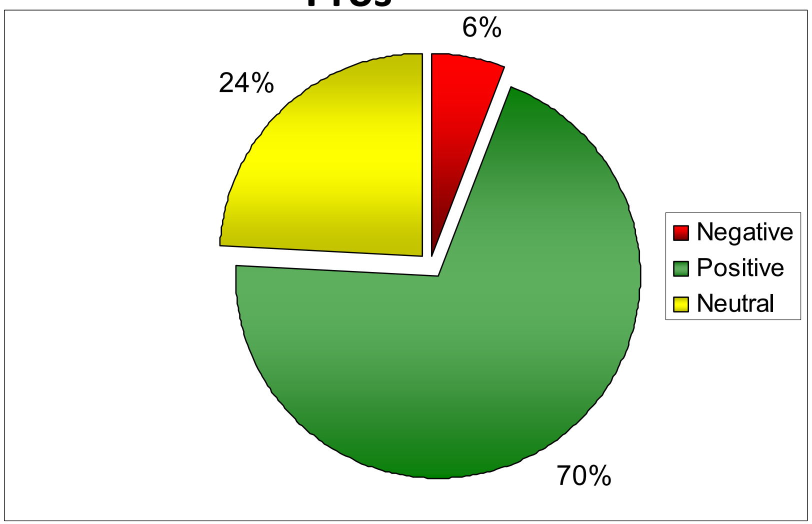
Source: J.D. Power Web Intelligence Division

Both Pros and Joes express almost identical, and very positive, sentiment when discussing the new Insight.

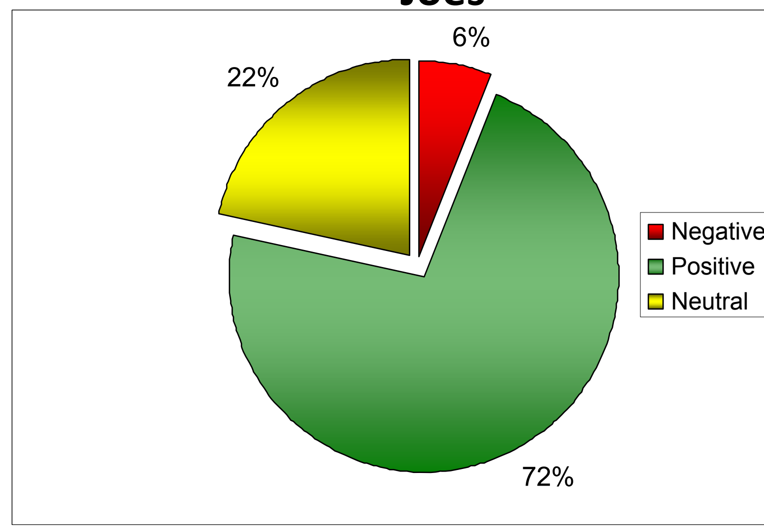
Honda Insight Posts

Pros vs. Joes

Pros



Joes



- **Enthused about the new redesign, Honda's image, and the Insight's lower cost.**
- **Happy to see another option to the Prius.**

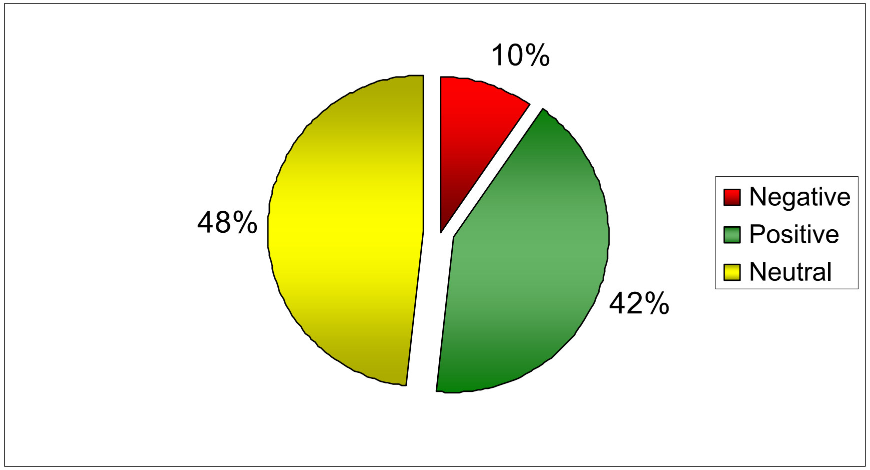
Source: J.D. Power Web Intelligence Division

However, in posts that mention BOTH the Insight and the Prius, sentiment becomes much less positive…especially for Joes.

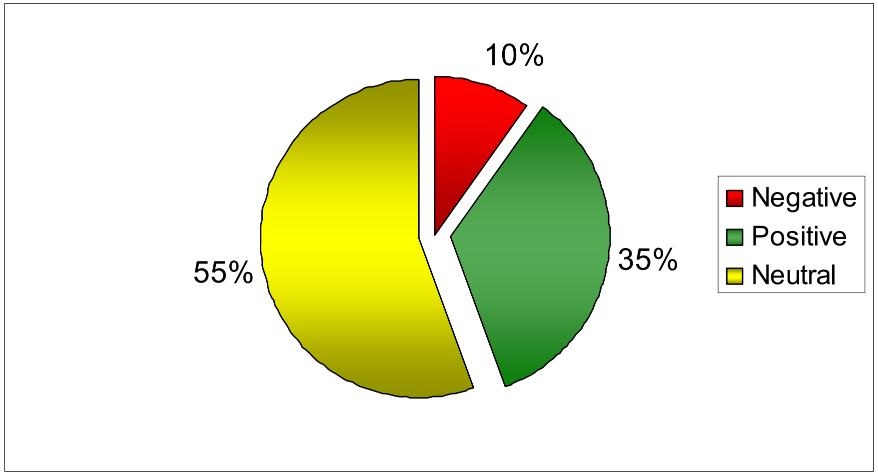
Honda Insight: Posts Comparing to Prius

Pros vs. Joes

Pros



Joes



- **Concerned about the quality of the Insight.**
- **Derivative, Prius-like styling**
- **Civic Hybrid seen as a better option for some**

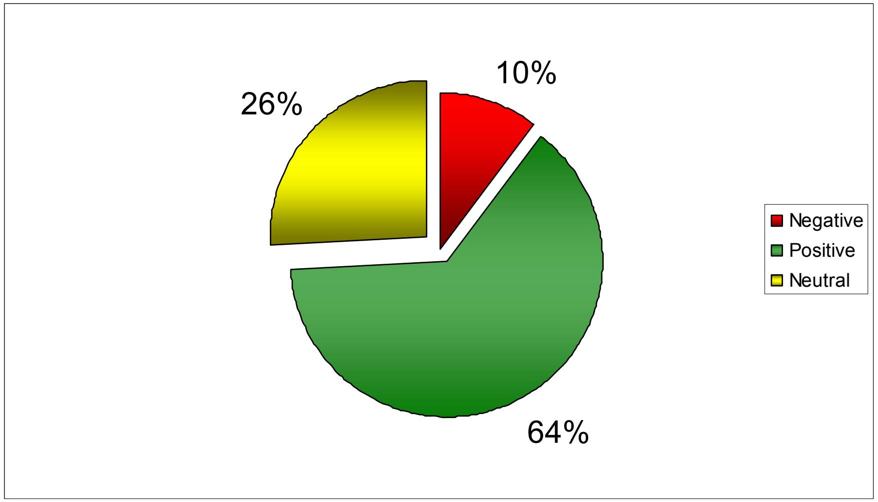
Source: J.D. Power Web Intelligence Division

Tellingly, this same phenomenon does not seem to impact the Prius…sentiment remains very positive.

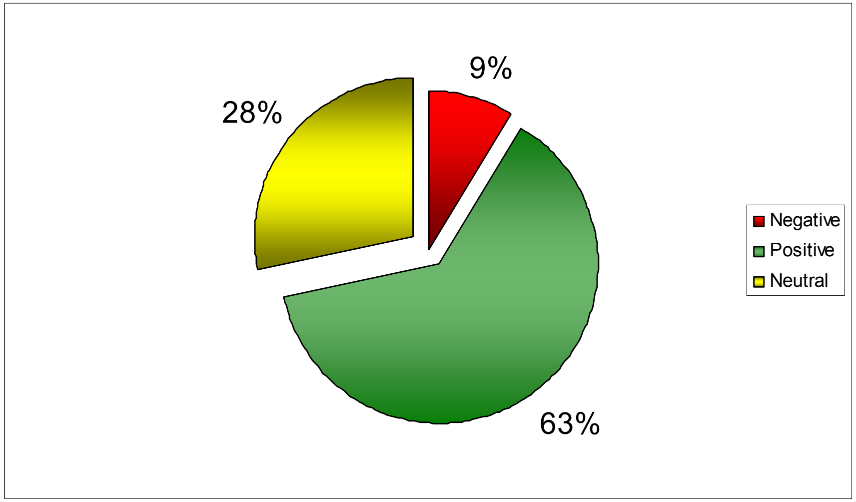
Toyota Prius: Posts Comparing to Insight

Pros vs. Joes

Pros



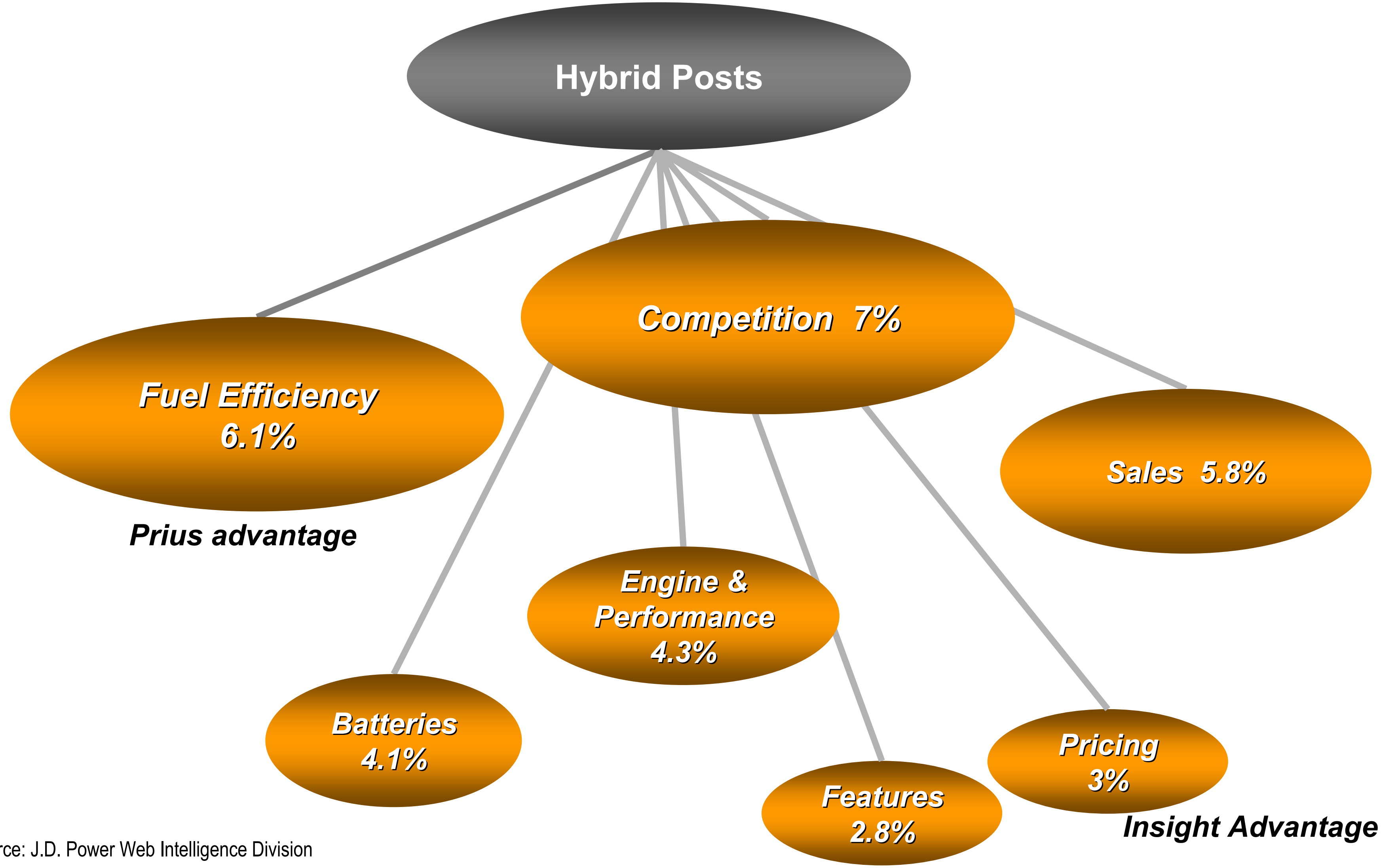
Joes



- **Extremely well established presence in the Hybrid space…Prius = hybrid**
- **Better fuel economy**
- **Toyota quality reputation**

Source: J.D. Power Web Intelligence Division

When consumers discuss vehicles like the Insight and Prius, what is on their minds?



Prius advantage

Insight Advantage

Source: J.D. Power Web Intelligence Division

Summary Observations

- Although there is a lot of positive sentiment for the Insight, a few critical issues exist:
  - Not nearly as much buzz as the Prius
  - Cost advantage simply isn't compelling enough
  - Prius economy advantage is more compelling
  - Quality concerns
  - Derivative "hybrid" styling

"But overall, if you want to show the world your green cred while tooling around the Toyota Prius is pretty much THE way to do it...At the rate Toyota sells these things, pretty soon, saying "hybrid" to a person will give them a mental picture that equals "Prius". Unless there are more alternatives out there for sale, Prius will be to hybrid what Kleenex is to wiping your nose. The name will simply become the product..."

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Auto and Media Patterns

Segment Analysis

The McGraw-Hill Companies

Segment Analysis

- Let's take a look at the media behavior of the top 4 segments of 2009 so far
- These segments had the highest positive percent change from 2008 to 2009 from January through August:
  - Compact Premium CUV (+16%)
  - Midsize CUV (-2%)
  - Midsize Sporty (-3%)
  - Compact CUV (-13%)

Majority of the top models are imports

Top Five Models by Segment (V%)

Compact CUV	Compact Premium CUV	Midsize CUV	Midsize Sporty
Honda CR-V	BMW X3	Ford Edge	Ford Mustang
Toyota RAV4	Acura RDX	Toyota Highlander (Non-Hybrid)	Toyota Solara
Ford Escape (Non-Hybrid)	Infiniti EX Series	GMC Acadia	Mitsubishi Eclipse/Spyder
Saturn VUE (Non-Hybrid)	Land Rover LR2	Hyundai Santa Fe	Dodge Challenger
Nissan Rogue		Nissan Murano	Mazda RX-8
15 / 27	4 / 4	8 / 17	3 / 6

= # of Imports / Total # of Models in each Segment

Source: 2009 Power Auto Offline Media Report, Summer

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Widely different magazines serve the different segments

Top Five Indexing Magazines Read by Segment

Compact CUV	Compact Premium CUV	Midsize CUV	Midsize Sporty
Fitness	The Economist	Parents	Playboy
Midwest Living	The New York Times Magazine	Parenting	Auto Week
American Baby	Robb Report	Golf Magazine	Fitness
In Touch	Veranda	Family Fun	Maxim
Ladies' Home Journal	Fast Company	Golf Digest	Muscle & Fitness

Source: 2009 Power Auto Offline Media Report, Summer
Read or looked into a publication in the last 6 months (including Sunday Supplements)

The same is true with Cable

Top Five Indexing Cable Stations by Segment

Compact CUV	Compact Premium CUV	Midsize CUV	Midsize Sporty
Bravo	E!	HGTV	Comedy Central
HGTV	Bravo	Food Network	CMT
ABC Family	CNBC	The Weather Channel	Adult Swim
USA Network	Adult Swim	ESPN	truTV
Food Network	Oxygen	MSNBC	SciFi (Syfy)

Source: 2009 Power Auto Offline Media Report, Summer
Cable Stations Watched in Past 7 Days

There is a wide difference in high composition sites between segments

Top Four Indexing Web Sites

Compact CUV	Premium CUV	Midsize CUV	Midsize Sporty
Winster.com	Mangafox.com	Dailymakeover.com	King5.com
Everydayhealth.com	Fanbox.com	Sparkpeople.com	Aetv.com
Pogo.com	Xe.com	Infospace.com	Gadling.com
News.aol.com	Pbs.org	News.aol.com	Golf.com

Based to online new-vehicle buyers within the Segment
Minimum 10% Online NVB Reach; Ranked by composition index

Source: 2009 PCB July

Compact Premium CUV

Compact Premium CUV – the only growing segment

Current Models

Acura RDX

BMW X3

Infiniti EX

Land Rover LR2

Recent New Entries

Audi Q5

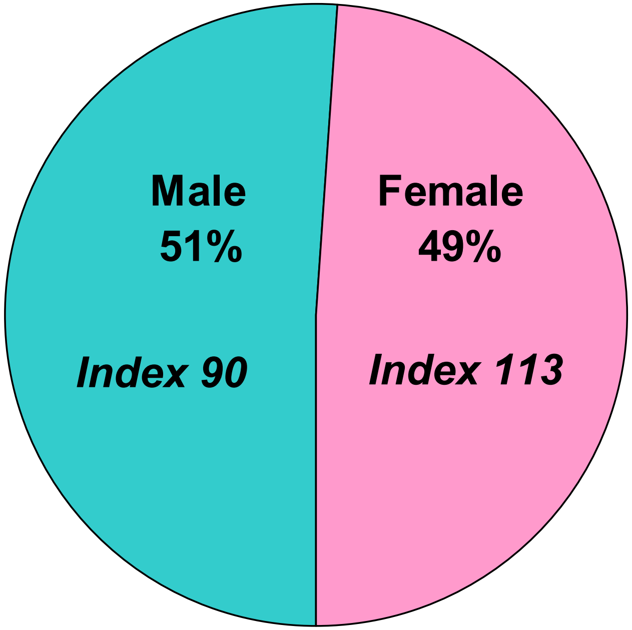
Mercedes-Benz GLK Class

Volvo XC60

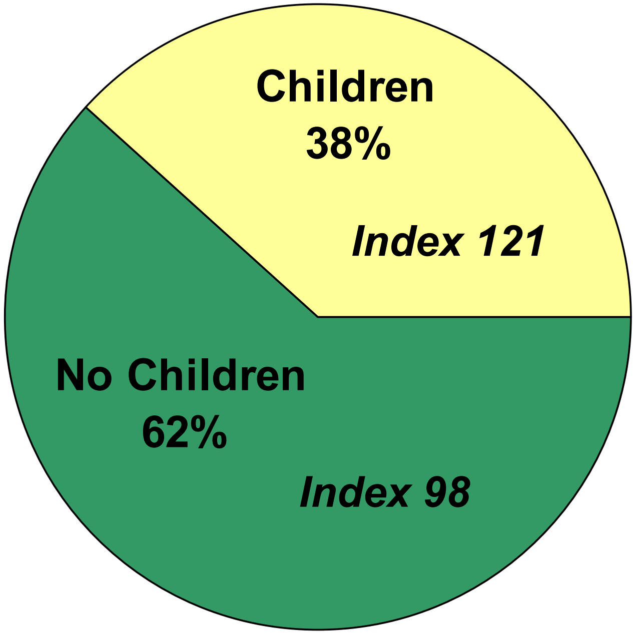
Source: J.D. Power Automotive Forecasting; Photos Courtesy of Edmunds.com

Compact Premium CUV – Household Picture

Gender of Principal Driver



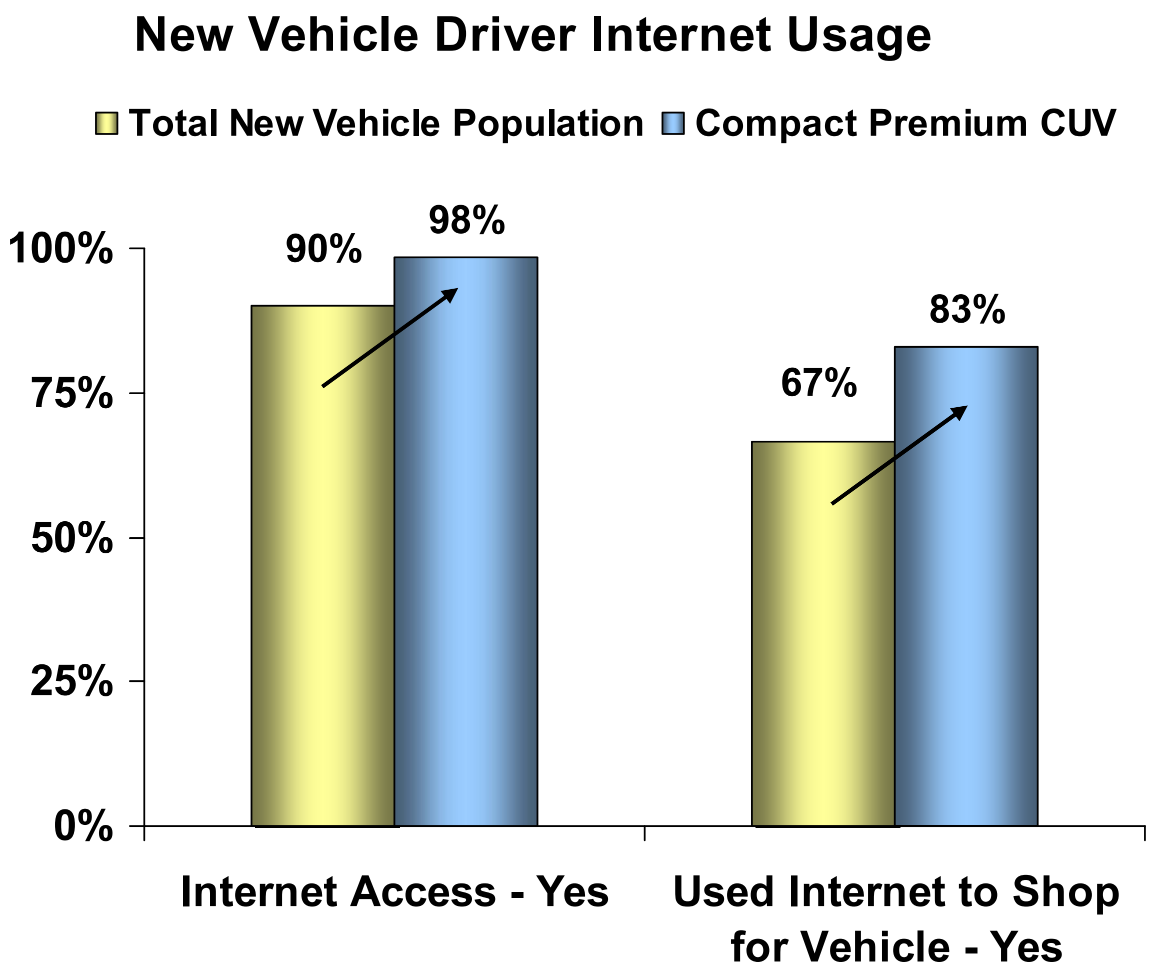
Children in Household



Source: 2009 Power Auto Offline Media Report, Summer

Children in Household 17 years or younger

Compact Premium CUV drivers are more active online than your typical new vehicle driver



Source: 2009 Power Auto Offline Media Report, Summer

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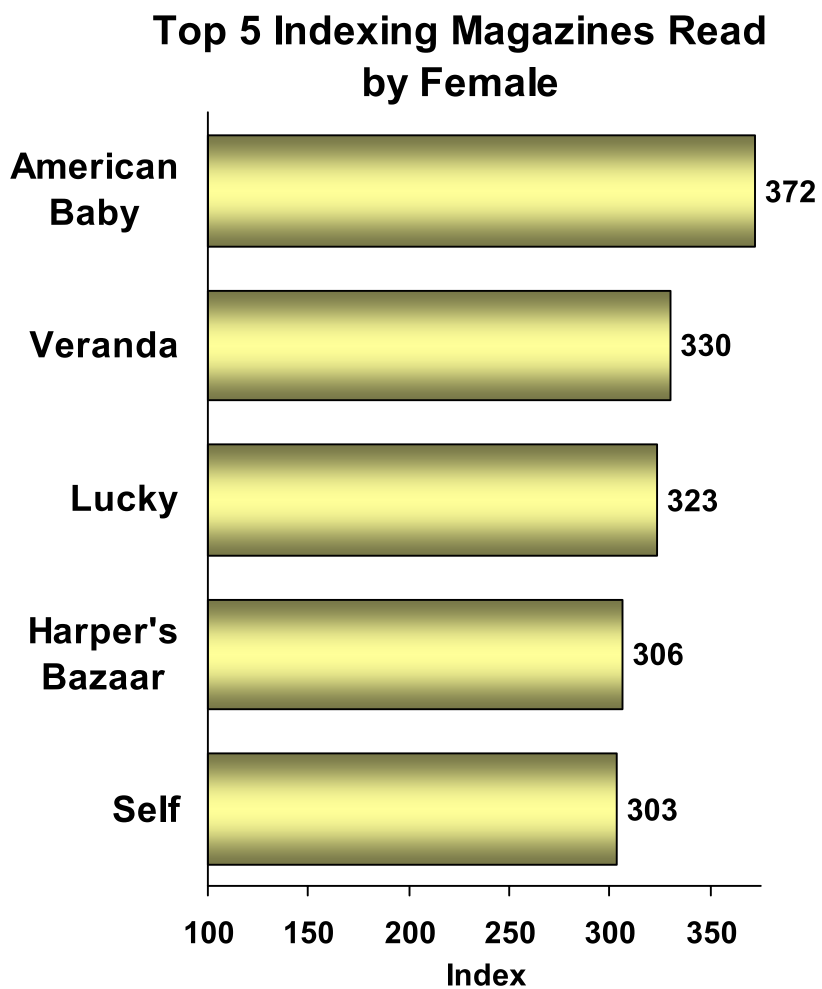
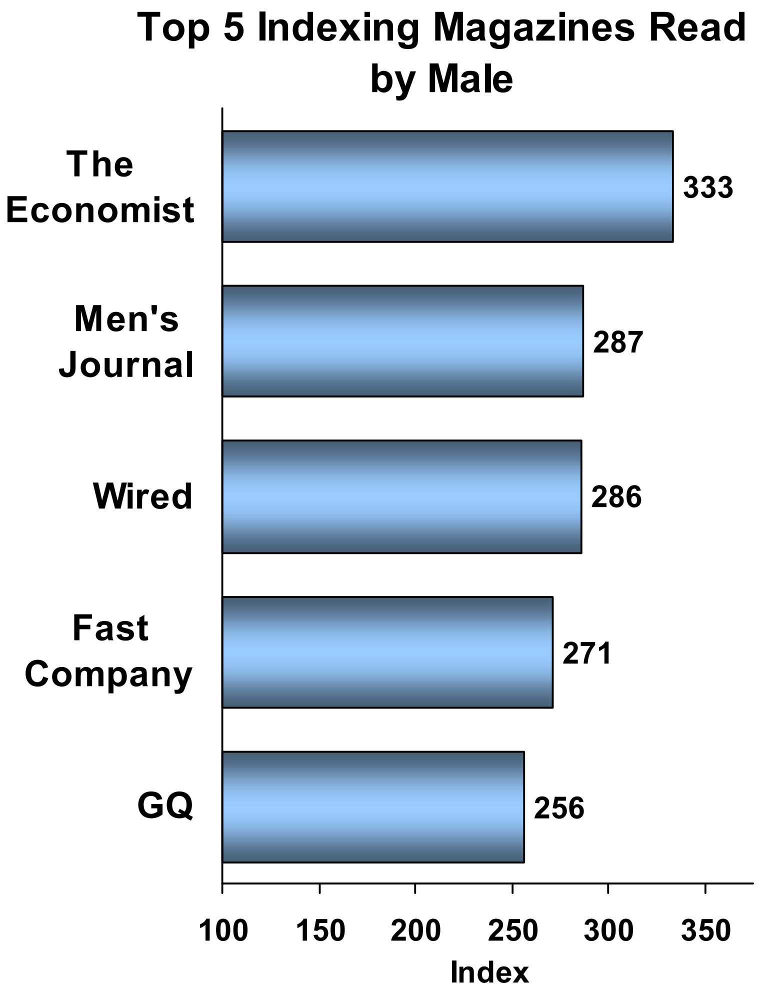
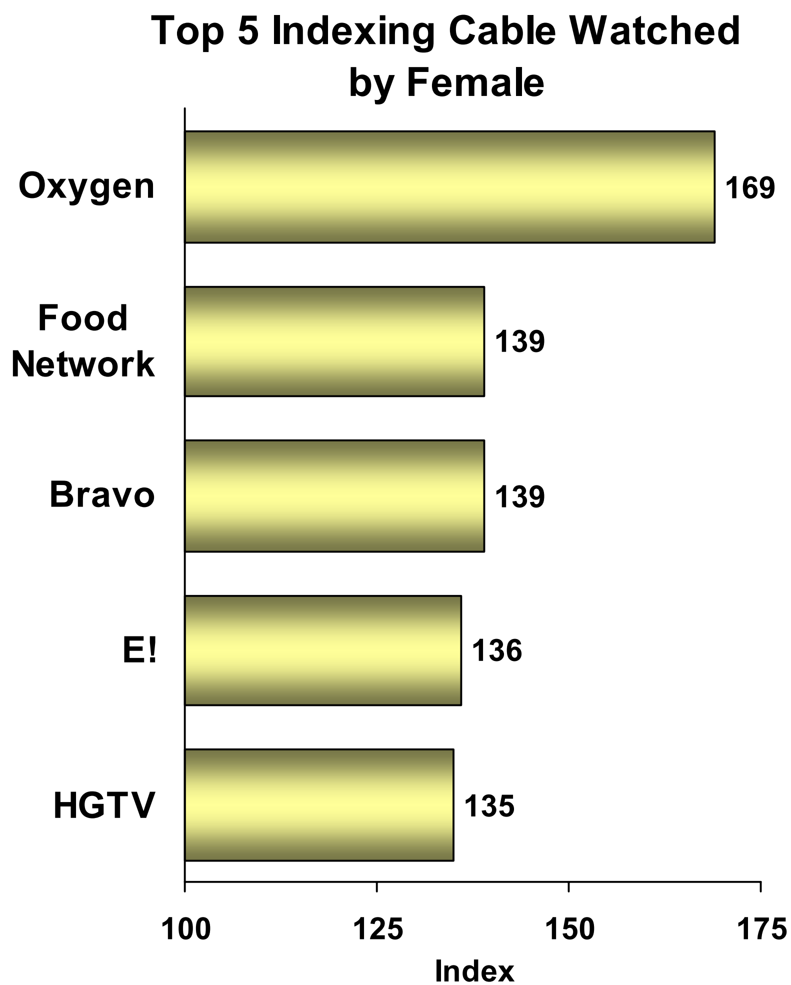
Compact Premium CUV males read business, men's interest, and tech magazines

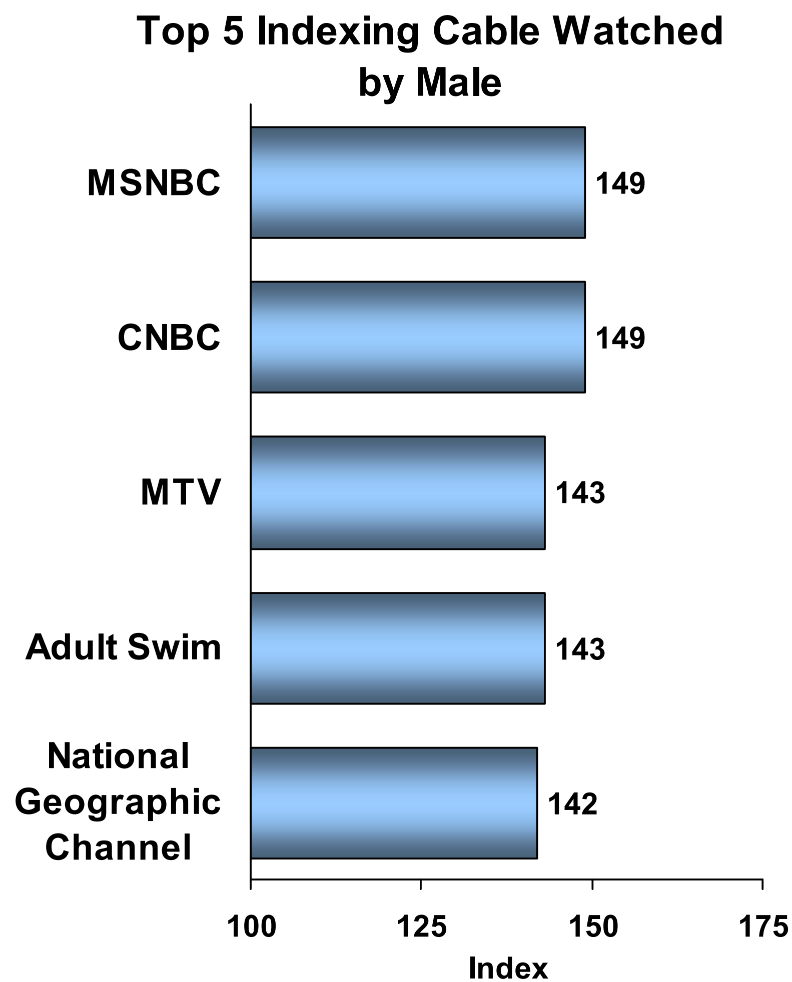




Source: 2009 Power Auto Offline Media Report, Summer
Read or looked into a publication in the last 6 months

Compact Premium CUV females watch drama, entertainment, and home improvement networks





Source: 2009 Power Auto Offline Media Report, Summer
Cable TV Stations Watched in Past 7 Days - Yes

A look forward

New Models on the Radar

New Models

299 Current Models
+ 21 in 2009
+ 23 in 2010

Photo source: JDPower.com

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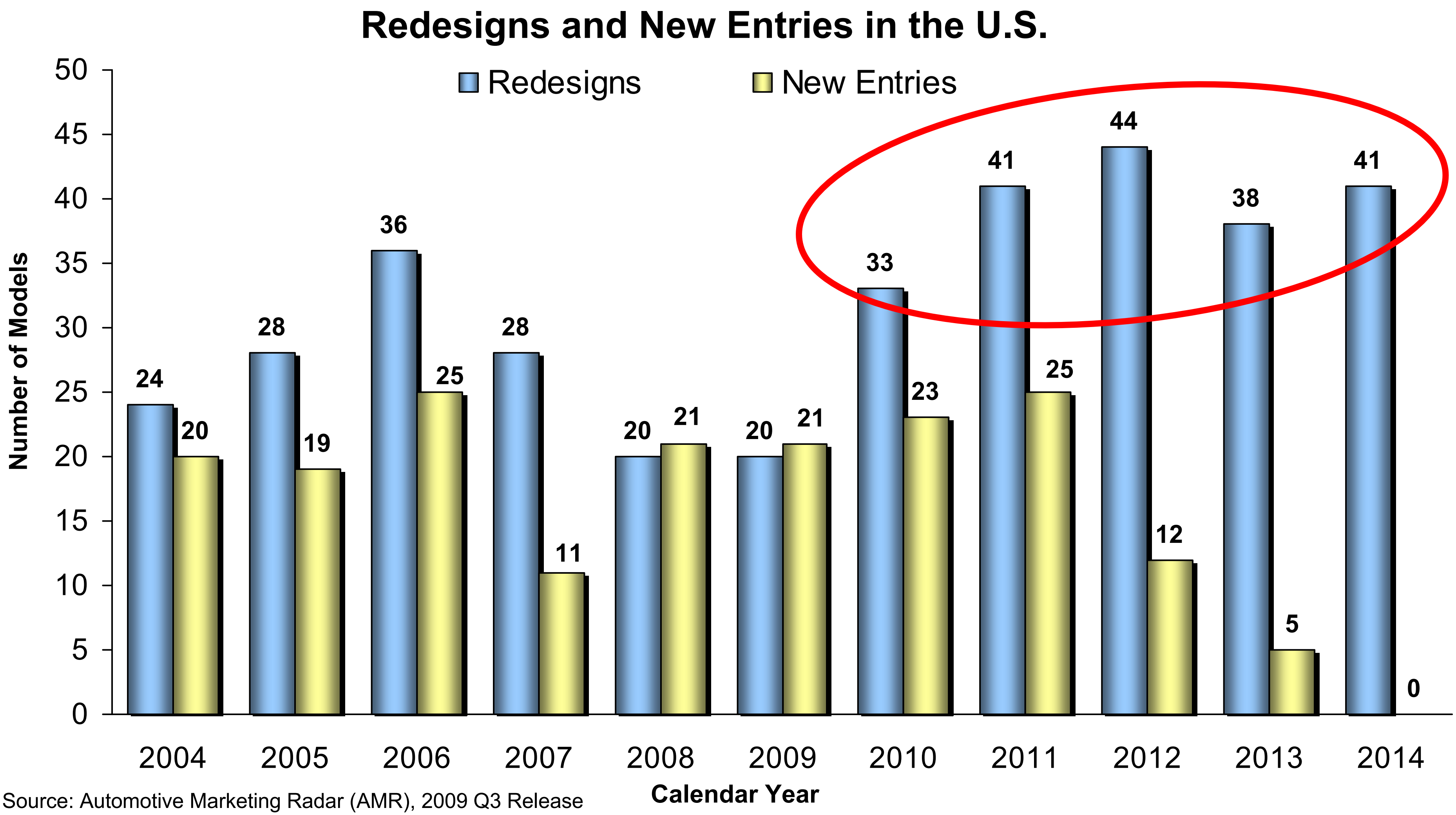
Automotive Marketing Radar (AMR)

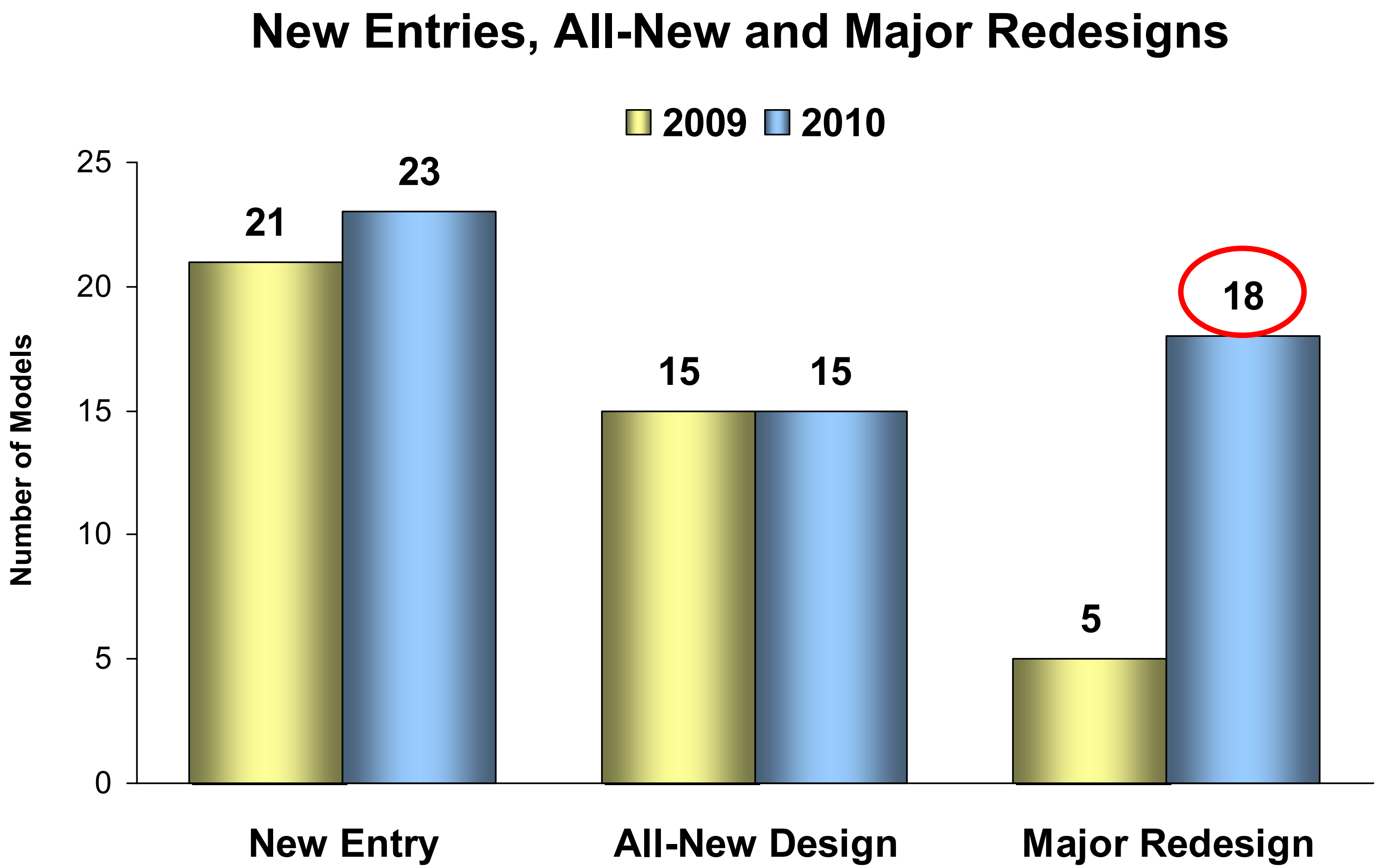
- Interactive tool
- Industry overview
- Provides details on launch vehicles, including projected launch date
- Sales volume forecasts
- Competitive set data
- Nameplate, segment, and model level data

Redesigns and new entries promise to fragment the market, requiring more effective targeting



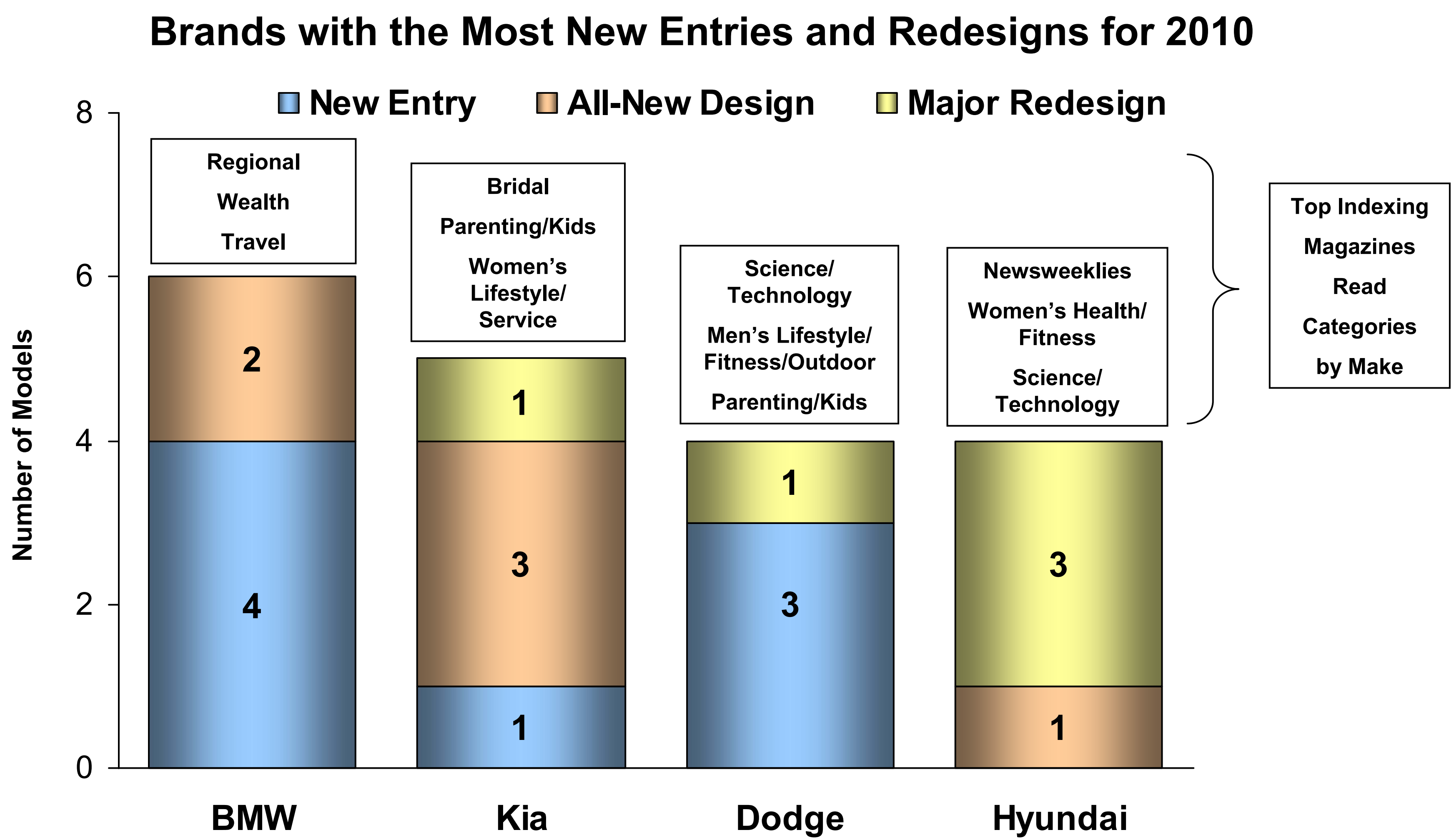
Source: Automotive Marketing Radar (AMR), 2009 Q3 Release
Redesigns = All-New and Major

There are 18 major redesigns planned for 2010



Source: Automotive Marketing Radar (AMR), 2009 Q3 Release

BMW will launch the most new models in 2010



Source: Automotive Marketing Radar (AMR), 2009 Q3 Release; 2009 Power Auto Offline Media Report, Summer

9 new entries are scheduled for the 1st half of 2010

New Entries

2010 Q1

Model	Segment
BMW PAS	Midsize Prem. CUV
BMW X1	Compact Prem. CUV
Honda Edix	Midsize Van
Lexus GT 450	Large Prem. Sporty
Mahindra Pickup	Midsize Pickup
Suzuki Kizashi	Midsize Conv.

2010 Q2

Model	Segment
BMW Z9	Large Prem. Sporty
Ford Fiesta	Compact Basic
Honda CR-Z	Compact Conv.

Source: Automotive Marketing Radar (AMR), 2009 Q3 Release

14 new entries are scheduled for the 2nd half of 2010

New Entries

2010 Q3

Model	Segment
BMW X4	Compact Prem. CUV
Dodge Circuit	Compact Prem. Sporty
Dodge TBD	Midsize Utility
Kia Soul'ster	Midsize Pickup
Suzuki Swift	Compact Basic
Volkswagen NCS	Compact Conv.

2010 Q4

Model	Segment
Audi A7	Midsize Prem. Sporty
Chevrolet Cruze	Compact Conv.
Chevrolet Volt	Compact Conv.
Dodge Hornet	Compact Basic
MINI Crossman	Compact Conv.
Nissan EV	Compact Conv.
Nissan NV-Series	Large Van
Scion Coupe	Compact Sporty

Source: Automotive Marketing Radar (AMR), 2009 Q3 Release

Hottest New Models and Redesigns Forecast for 2010

Kia Forte

83,255 Sales forecasted for 2010

Compact Conventional

Chevrolet Cruze

80,405 Sales forecasted for 2010

Compact Conventional

Chevrolet Camaro

67,696 Sales forecasted for 2010

Midsize Sporty

Source: J.D. Power Automotive Forecasting; Photo source: JDPower.com

Hottest New Models and Redesigns Forecast for 2010

GMC Terrain

40,460 Sales forecasted for 2010

Compact CUV

Honda Insight

39,186 Sales forecasted for 2010

Compact Conventional

Kia Sorento

38,159 Sales forecasted for 2010

Midsize Utility

Source: J.D. Power Automotive Forecasting; Photo source: JDPower.com

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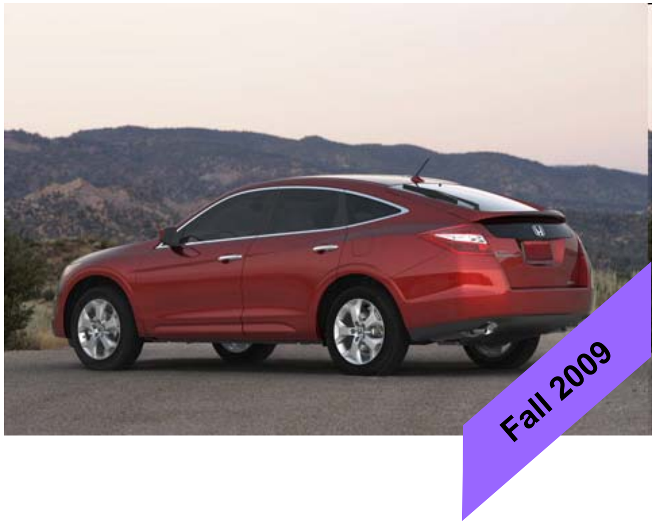
Hottest New Models and Redesigns Forecast for 2010

Kia Soul

36,375 Sales forecasted for 2010

Compact CUV



Honda Accord Crosstour

35,815 Sales forecasted for 2010

Midsize CUV

Ford Fiesta

31,644 Sales forecasted for 2010

Compact Basic

Source: J.D. Power Automotive Forecasting; Photo source: JDPower.com

Takeaways from today's presentation

- Sales are projected to increase in the near future, but it will take time.
- Online behavior of new vehicle buyers is radically different than the general Internet population. Careful targeting is required.
- Stay informed with the blogosphere and buzz.
- As the market rebuilds with new models, increased marketing activity will be required.

For more automotive marketing information

- Visit our blog for a look at the past, present, and future of automotive Internet, and a copy of the presentation:

  www.OnlineAutomotiveReview.com

- Follow us on Twitter:

  http://twitter.com/JDPowerInternet

- Join us at the Automotive Internet Roundtable:

  http://www.jdpower.com/corporate/about/roundtable/

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Thank You

Q & A

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