



# Automotive Marketing Online:

## Negotiating the Curves

**Executive Summary:** After consistently leading the US in advertising spending, the automotive sector has dropped into the number-two spot behind retail. Ad spending in the sector is going in reverse—everywhere except on the Internet.

### Online Advertising Spending by the US Automotive Industry, 2007-2012 (billions and % change)

2007	\$2.45 (25.6%)
2008	\$2.98 (21.6%)
2009	\$3.39 (13.8%)
2010	\$3.85 (13.6%)
2011	\$4.51 (17.1%)
2012	\$5.61 (24.4%)

*Note: includes auto manufacturers, national dealer associations, individual dealerships and after-market vendors advertising new and used cars of all types; excludes auto insurance and rental companies*  
 Source: eMarketer, June 2008

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Even as new-vehicle sales decline, automotive marketers will spend nearly \$3 billion online this year, up 21.6%. By 2012, automotive online ad spending will top \$5.6 billion.

Auto marketers are following their customers. Research shows that eight out of 10 consumers now consult the Internet at least once during the car-buying process. In fact, recommendations from family and friends have been replaced in importance by online customer reviews—by strangers.

Manufacturers' sites are now visited about as often as third-party sites, and how dealers handle online inquiries can make or break a sale.

Nevertheless, though automakers and dealers see the Internet as cost effective, measurable and in some ways better than traditional media, the channel doesn't get a free ride. Marketers are monitoring their online mix, executions and technology as closely as they do older, established ad vehicles to ensure that all touch points work in sync to connect with consumers who tend to steer away from ads and promotions of all kinds.

### Key Questions

- Where are automotive manufacturers spending their advertising budgets?
- How will the slowing economy affect car sales?
- Are dealerships lagging in adopting Web 2.0 tactics?
- How has consumer behavior online been influenced by social media?
- What can dealers do to boost conversion rates from online inquiries?
- Do consumers really want to buy cars online?

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## Industry Snapshot

### Key eMarketer Numbers — Automotive Marketing Online

<b>\$5.61 billion</b>	Online advertising spending by the US automotive industry in 2012, up from \$2.45 billion in 2007
<b>11.0%</b>	Online advertising spending by the US automotive industry % of total US online advertising spending in 2012, down from 11.6% in 2007
<b>24.4%</b>	Growth in online advertising spending by the US automotive industry in 2012, down from 25.6% in 2007

*Note: includes auto manufacturers, national dealer associations, individual dealerships and after-market vendors advertising new and used cars of all types; excludes auto insurance and rental companies*  
*Source: eMarketer, June 2008*

Crude oil's price increase since the beginning of the decade is being felt across all sectors, but it appears to be hitting automotive consumers hardest, which hurts the automobile industry.

General Motors, Ford Motor, Chrysler and others continue to be roiled by red ink, intense competition and the runaway costs of everything from healthcare to copper and petroleum-based resins.

The Big Three, in response, are restructuring their North American operations, closing plants, renegotiating union contracts, cutting costs, reducing workforces and shedding units. In March 2008, Ford announced it would sell Land Rover and Jaguar to Tata for \$1.7 billion—less than one-third of the \$5.3 billion it paid for the brands. And that does not count the \$10 billion it pumped into Jaguar, trying to turn it around.

J.D. Power & Associates' chief economist, Bob Schnorbus, told *Advertising Age* he expected sales figures for the US automobile market to come in at roughly 15.8 million new vehicles in 2008. That's a 7% drop from the 16.9 million units the country averaged in the early part of the decade.

This year is expected to be the worst for sales of passenger cars and light trucks in a decade. Particularly painful for an industry where new vehicles sell for the skinniest of profits is slack demand for the once invincible (and highly lucrative) trucks and SUVs.

Not surprisingly, fuel-efficient models are becoming more popular.

Ford, the country's number-three automaker after GM and Toyota, predicts that sales of small cars in the US will increase 25% by 2012 to a record 3.4 million, while SUV and pickup sales continue to languish.

### Green: The New Black

After being left in the dust of more fuel-efficient imports, Detroit is tuning up production of small cars.

According to car-buying Web site Autobytel.com, Ford, Saturn and Toyota are redesigning their hybrid SUVs. GM is developing a Volt hybrid under the Chevrolet mantle, and this year it will launch hybrid versions of the Chevrolet Tahoe and GMC Yukon. Fuel-efficient sedans—from Chevrolet's Malibu to the Aura from Saturn (also part of GM)—as well as gas-sipping crossovers (automobiles taller than a standard sedan but with better gas mileage than the typical SUV) like Chevrolet's Traverse and Ford's Edge SUV are in the offing. At this year's New York International Auto Show, just about every type of vehicle, from SUVs to sedans, has a hybrid offering. Clean-burning, high-mileage diesels are also coming to the fore.

Still, it is easier to talk green than walk (or drive) green.

As if American automakers didn't have enough problems, competition is coming from unexpected corners as well.

Accelerated Composites, a private California startup, announced it would begin selling the 230-miles per gallon, three-wheeled Aptera in California by the end of 2008. The car, which looks like a pedicab out of "The Jetsons," will have a motorcycle engine and seat two adults in front and a small child in back. It will be available as a plug-in hybrid or in an electric version. Aptera will not have GM shaking in its whitewalls, but the concept does give fodder to advocates of high-mileage vehicles.

In January, Americans started seeing the tiny smart car on neighborhood streets. The car, a mainstay in Europe since 1998, gets 33 to 41 mpg, which smart (a division of Mercedes) says is better than any other car on US roads today, save hybrids. Three models are available—the smart fortwo pure coupe (starting at \$11,590), the smart fortwo passion coupe (starting at \$13,590) and the smart fortwo passion cabriolet convertible (starting at \$16,590).

Also in January, Indian automaker Tata said it would begin selling a \$2,500 car by the end of the year. Truncated in size and amenities, the Nano (which will be pasted together, have one windshield wiper and no tubes in its tires) will not be sold in the US, but it has auto marketers worldwide rethinking their business model.

Chrysler—which was bought by private investors in 2007—last year said it would team with China's Chery Autos, that country's largest automaker, to create a low-cost car. And GM—which last year dropped to the world's number-two carmaker, behind Toyota—put the kibosh on plans for a new line of gas-guzzling V-8 vehicles. Instead, it will devote the money to smaller cars, according to *Newsweek*. Though Toyota is number one globally, GM still leads in the US.

With American consumers thinking small, luxury vehicles are not off the table for US automakers—if they look abroad. With the dollar tumbling in value, demand for high-priced American offerings is expected to come from Asia, particularly China, Russia, India and the Middle East, rather than at home.

## Automotive Advertising

Although automotive remained the largest US advertising category, automakers have already begun reining in their ad budgets. According to eMarketer calculations based on TNS Media Intelligence data, spending declined 5.8% in 2006, a loss of \$1.2 billion. GM led the pack, cutting its advertising spending by \$814 million, or 19.8%. The former top-spending US advertiser fell to third place, behind Procter & Gamble and AT&T.

The trend continued in 2007, as automakers, dealerships, parts suppliers and accessories marketers spent \$18.6 billion, down 6.4% from \$19.9 billion one year earlier, according to TNS.

### Top 10 US Industries, Ranked by Total Advertising Spending\*, 2003-2007 (billions)

	2003	2004	2005	2006	2007	Total 2003-2007
1. Automotive (access and equipment)	\$13.65	\$15.17	\$14.86	\$14.05	\$13.17	\$70.90
2. Retail	\$13.20	\$13.80	\$13.90	\$14.25	\$13.90	\$69.05
5. Media and advertising	\$8.66	\$9.14	\$10.06	\$10.30	\$10.75	\$48.91
3. Communications	\$7.52	\$8.40	\$8.57	\$9.48	\$9.11	\$43.10
8. Financial	\$6.67	\$7.86	\$8.51	\$8.70	\$9.22	\$40.98
4. Misc. services and amusements	\$6.61	\$7.34	\$7.88	\$8.74	\$8.99	\$39.57
6. Medicines and proprietary remedies	\$5.92	\$6.93	\$6.87	\$7.68	\$8.10	\$35.51
7. Direct response companies	\$4.74	\$5.31	\$6.13	\$6.51	\$7.81	\$30.50
9. Automotive (dealers and services)	\$6.28	\$6.65	\$6.25	\$5.83	\$5.44	\$30.45
10. Insurance and real estate	\$3.54	\$4.53	\$5.49	\$6.58	\$6.37	\$26.51

*Note: includes outdoor, Internet (display advertising only), radio (network radio, national spot radio, local/spot radio, local radio detail), newspaper (local, national, Hispanic), magazines (BtoB, consumer, Hispanic, local, Sunday magazines), TV (network, cable, spot, syndicated and Spanish language); \*ranked by total spending for 2003-2007*

*Source: TNS Media Intelligence, provided to eMarketer, March 20, 2008*

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Overall ad spending, like new-car sales, is not expected to stage a comeback this year or in the near future.

Borrell Associates' 2007 automotive report noted that, between 2002 and 2007, auto ad spending grew at a compound annual growth rate (CAGR) of 3.7%. Looking ahead to the next five years, the CAGR is expected to be just 1.7%.

The Kelsey Group in December 2007 forecast global automotive ad spending to remain around \$40 billion through 2011. However, the Internet's share of that spend would increase from 5% in 2007 to 13% globally in 2011. Traditional classifieds will migrate online and newspapers' share of spending will decline from 17% to 14% in the same period.

2008 does not look like a turnaround year, by any means.

The pullback in ad spending mirrors the decline in new-vehicle sales. This year sales are expected to be below 16 million, according to the National Automotive Dealers Association (NADA). Through 2014, J.D. Power predicts just an 8% increase in new-vehicle sales, about 1.2 million.

Add to that a weak economy, ever-rising gas prices and tighter credit, and it is no surprise that consumers are hanging on to their aging cars. For the second year in a row, R.L. Polk & Co. reported that the median age for passenger cars was at a record high of 9.2 years. Cars 11 or more years old made up 41.3% of the US car population in 2007, and that figure was 29.5% for light trucks.

Roughly 6% of the US adult population buys a new vehicle in any given year, according to J.D. Power, so customer retention is paramount. The cost of new-customer acquisition is about four times that of maintaining an existing relationship, and with retention rates averaging 49% for the industry there is an opportunity for savvy marketers.

## Spending Shifts Online

Overall spending may be stagnant, but automakers and dealers will continue to shift it among media channels.

Between 2005 and 2007, advertising spending moved from traditional media into digital and out-of-home initiatives, according to TNS Media Intelligence data supplied to eMarketer. Hardest hit were newspapers (-43.5%) and magazines (-13.1%), while TV (-7.5%) and radio (-7.4%) experienced smaller but similar declines. At the same time, spending for online display ads rose 100.6%, while outdoor climbed a modest 3.3%.

### Total Advertising Spending by the US Automotive Industry, by Media, 2005-2007 (thousands)

	2005	2006	2007
Television	\$8,702,260	\$8,748,571	\$8,048,708
Magazines	\$2,408,869	\$2,121,735	\$2,093,828
Newspapers	\$2,357,035	\$1,583,943	\$1,332,683
Radio	\$831,243	\$801,303	\$769,751
Internet*	\$374,907	\$626,819	\$752,189
Outdoor	\$182,124	\$172,404	\$188,045
<b>Total</b>	<b>\$14,856,437</b>	<b>\$14,054,775</b>	<b>\$13,185,204</b>

Note: \*excludes paid search and broadband video ads  
Source: TNS Media Intelligence, provided to eMarketer, May 9, 2008

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eMarketer estimates online ad spending by the entire automotive industry (excluding car rental and insurance) will reach \$2.98 billion this year as advertisers large and small try to make every dollar count.

### Online Advertising Spending by the US Automotive Industry, 2007-2012 (billions and % change)

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Note: includes auto manufacturers, national dealer associations, individual dealerships and after-market vendors advertising new and used cars of all types; excludes auto insurance and rental companies  
Source: eMarketer, June 2008

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By 2012, automotive online advertising will hit \$5.6 billion, or 11% of the total \$51 billion eMarketer forecasts for that year.

(Note that eMarketer benchmarks its figures against data reported by the Interactive Advertising Bureau (IAB) and PricewaterhouseCoopers (PwC), the most recent year for which was 2007.)

Between 2005 and 2007, the auto industry accounted for 11% to 11.6% of all online advertising. Even as growth slows for Internet advertising overall, eMarketer expects the auto industry will keep pace with growth of 21.6% this year and about 14% in 2009.

Borrell's data is roughly in line with eMarketer's.

### US Online Automotive Advertising Spending by Car Sellers\*, 2001, 2006 & 2011 (billions)

2001	\$0.5
2006	\$2.3
2011	\$4.2

Note: includes video and paid search; \*automotive manufacturers, franchises, dealerships and private sellers  
Source: Borrell Associates Inc., "2007 Online Auto Advertising Shifts Into High Gear" as cited by ClickZ, May 10, 2007

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Borrell predicts that online auto ad spending will increase by 13% over the next five years, compared with less than 2% for total auto industry spending. By 2009, digital spending will hit \$4 billion, surpassing every other medium except broadcast television.

### Manufacturers' Media Mix

Automakers' top priorities are getting their name into a consumer's "consideration set" and then helping those in-market shoppers reach a dealership. To that end, their use of major media channels has changed significantly in recent years, moving out of print and radio and onto the Internet.

According to eMarketer calculations based on TNS data, major media ad spending by original equipment manufacturers (OEMs) fell by 12.1% between 2005 and 2007, from \$10.7 billion to \$9.4 billion.

Newspapers took the hardest hit, falling 52.6% in the period, while magazines dropped 14.5%. Internet spending in the form of display ads rose 119% to \$610 million—or about 50% of the probable total, since TNS does not include paid search or broadband video.

### Total Advertising Spending by US Auto Manufacturers, by Media, 2005-2007 (thousands)

	2005	2006	2007
Television	\$6,708,903	\$6,650,178	\$6,034,951
Magazines	\$2,051,686	\$1,791,647	\$1,754,522
Internet*	\$278,456	\$436,454	\$609,845
Newspapers	\$1,240,661	\$705,999	\$588,322
Radio	\$288,628	\$271,806	\$286,204
Outdoor	\$152,431	\$139,308	\$153,296
<b>Total</b>	<b>\$10,720,764</b>	<b>\$9,995,392</b>	<b>\$9,427,139</b>

Note: \*excludes paid search and broadband video ads  
Source: TNS Media Intelligence, provided to eMarketer, May

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## Spending Shifts Online

Put into perspective, total online spending last year by automakers equaled GM's television budget alone. Even though GM upped its online spending by 78% last year, the total was just \$208.3 million. Ford and Chrysler boosted their online display spending by 65% and 41%, respectively.

The share of budget for each media channel—64% in television and just 6.5% online last year—illustrates the OEMs' reluctance to let go of old media habits. That is money wasted on a channel that does not deliver one-half of the influence that advertisers expect.

BIGresearch analyzed 2006 media spending by the top three US auto manufacturers—GM, Ford and Toyota—and found that 40% of the ad budget (what each company spent on television) influenced the purchase of fewer than 18% of respondents. Online advertising, however, received between 2.8% and 3.9% of the total budget and influenced a higher percentage of viewers—about 8.5%.

### US Advertising Spending vs. Influence to Purchase among Leading Automotive Advertisers, by Media, 2007

	Maga-zines	News-papers	Out-door	TV	Radio	Inter-net
<b>General Motors</b>						
% share of ad budget	12.2%	6.7%	1.2%	40.3%	3.0%	3.6%
% of respondents who said that the medium influences their auto purchases	16.9%	17.0%	10.2%	17.5%	6.4%	8.7%
<b>Ford Motor Co.</b>						
% share of ad budget	13.1%	5.9%	0.8%	40.9%	1.5%	3.9%
% of respondents who said that the medium influences their auto purchases	17.0%	16.5%	11.9%	18.0%	6.7%	8.4%
<b>Toyota</b>						
% share of ad budget	13.0%	2.6%	1.1%	39.5%	1.4%	2.8%
% of respondents who said that the medium influences their auto purchases	19.0%	15.8%	10.5%	16.8%	5.3%	8.6%

Source: BIGresearch as cited in press release, April 15, 2008

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comScore data showed that the top three automakers accounted for the majority of display ads, commanding 80% of the category's online page views.

### Top US Auto Manufacturer Online Advertisers, Ranked by Total Display Ad Views, January 2008 (millions and % of voice\*)

	Ad-exposed unique visitors	Total display ad views	% of voice
General Motors	102.6	1,687.1	32.8%
Toyota	62.4	1,356.8	26.4%
Ford Motor Co.	95.0	1,075.8	20.9%
Honda	57.9	377.9	7.3%
Nissan	31.3	291.7	5.7%
Chrysler LLC	22.1	123.9	2.4%
Hyundai Motors	16.7	95.2	1.9%
Volkswagen	7.1	60.5	1.2%
Suzuki Motor Corp.	5.4	42.5	0.8%
Harley Davidson	6.1	35.3	0.7%

Note: home/work/university locations; \*based on all publisher sites where auto manufacturer display ads appear  
Source: comScore Ad Metrix as cited in press release, March 28, 2008

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Many auto marketers are starting to use their decades-long expertise in TV ads to boost their online presence and engagement with in-market shoppers.

Sites such as driverTV showcase carmakers' products in three-minute, high-definition videos that virtually replace a trip to the dealer for a test drive. In March, NBC Universal paid about \$6 million for a 35% stake in driverTV, which has annual revenues of around \$8 million—solely from automakers, according to *The Wall Street Journal*.

Automakers are also building their own online video channels, offering streaming videos, video podcasts and music downloads to attract younger audiences.

Toyota's Scion brand last year added a broadband channel accessible through its Web site that featured a video newsletter by rapper Slick Rick. GM's Cadillac brand has worked user-generated videos into its campaigns since 2006, and now sponsors MyCadillacStory.com, a site that invites owners to post photos or essays about their Cadillac. And to launch its Edge crossover, Ford teamed with iTunes to offer free downloadable music videos on a monthly basis.

Higher-end nameplates are no less active online. Mercedes-Benz's online museum has been replaced by Mercedes.tv, where videos are updated weekly. Porsche Cars North America tripled its online spending between 2005 and 2007 and plans to keep boosting spending on video.

Audi launched German- and English-language broadband TV channels on its site last year. Scott Keogh, chief marketing officer at Audi, explains some of the thinking behind Audi's move online.

## eMarketer Interview

Scott Keogh, CMO, Audi

eMarketer: In the first quarter of the year General Motors said it would shift one-half of its marketing budget into digital marketing over the next three years. That's a big move.

S.K.: Online marketing is the absolute foundation of all our marketing efforts. We have highly educated and affluent consumers and they're online. We're never going to win at the game of massive TV advertising. It really is the only medium where we are active throughout the year.

eMarketer: How much have you increased the online budget year-over-year?

S.K.: We are up, double, I would say, over the last two years. Twenty percent of our media budget goes toward online. We more than doubled our online ad budget in 2007 to about \$1.2 million, and it looks like we'll double it again in 2008.

eMarketer: What are you doing with Audi's Web sites?

S.K.: We have audiusa.com, our business site, which lets consumers do configurations on cars. Then we have a site called truthinengineering.com which is about telling stories that get to the emotion of the brand. [The site offers theatrical-style videos highlighting eight different "truths" about the brand, from supporting technology to model features. "Truth in Iron Suit" features footage from "Iron Man."]

We have lots of microsites and we do a lot of online video...something like 100 podcasts, which are like entertainment and show the A4 or an R8 on a racetrack. There are also podcasts on technology...you can download a one- to two-minute episode on a feature, like the transmission system. Customers are downloading these to their iPods to listen to while they're in the car, which is an unexpected twist. We've had millions of downloads. Within the video footage there are real details on the cars.

We wanted the podcasts for absolute Audi fanatics. We didn't imagine how popular the videos would become. If someone understands the feature and benefit of the car, scores go up on customer satisfaction surveys. It's just a smarter way for us than mailing out books or manuals.

## Dealers Divvy Spending Differently

Call it "The Case of the Disappearing Dealers." The NADA reports that the number of US auto dealerships has fallen from 25,150 in 1987 to 20,700 last year, and this year new-car sales will decline 3%.

Still, franchise dealers spent \$7.86 billion on advertising last year, with the average ad spend per dealership increasing by 4% to slightly over \$378,000.

### Average Advertising Spending by US Automobile Dealerships, by Media, 2003-2007

	2003	2004	2005	2006	2007
Newspapers	\$187,534	\$177,992	\$118,790	\$99,702	\$100,839
Television	\$64,145	\$58,361	\$70,410	\$71,104	\$66,097
Radio	\$73,007	\$72,821	\$63,585	\$66,111	\$64,094
Internet	\$20,940	\$25,844	\$35,738	\$41,733	\$62,607
Direct mail	\$29,005	\$30,132	\$36,146	\$37,029	\$38,466
Other	\$19,411	\$18,726	\$35,556	\$48,940	\$46,242
<b>Total</b>	<b>\$394,042</b>	<b>\$383,876</b>	<b>\$360,225</b>	<b>\$364,619</b>	<b>\$378,346</b>
Total advertising % of total sales	1.22%	1.16%	1.11%	1.14%	1.13%
Total advertising per new vehicle sold	\$512	\$493	\$457	\$590	\$610

Note: numbers may not add up to total due to rounding  
 Source: National Automobile Dealers Association (NADA), "2008 NADA Data: Economic Impact of America's New-Car and New-Truck Dealers," May 2008

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Internet ad spending by dealers is rising in both share and importance: According to NADA, the typical dealership spent 16.5% on Internet advertising in 2007, compared with 11.5% in 2006 and 9.9% in 2005.

Dealers' ad spending focuses heavily on newspapers and spot television to reach a local audience. Only recently have dealers begun to use the Internet's geographic targeting capabilities to reach active online shoppers.

According to TNS, newspapers received 62% of dealer advertising in 2007, followed by television with 20.5%.

But the chart below reveals changing trends in media buying at the local level. Total ad spending dropped 13.5% between 2005 and 2007, to \$4.9 billion. Newspaper spending fell by almost 22% in that time, followed to a lesser extent by radio and outdoor.

### Total Advertising Spending by US Auto Dealerships, by Media, 2005-2007 (thousands)

	2005	2006	2007
Newspapers	\$3,850,051	\$3,313,087	\$3,011,762
Television	\$951,329	\$1,023,053	\$996,148
Radio	\$631,956	\$639,379	\$582,328
Outdoor	\$126,340	\$130,936	\$125,418
Internet*	\$39,570	\$87,240	\$114,399
Magazines	\$17,099	\$26,344	\$29,246
<b>Total</b>	<b>\$5,616,345</b>	<b>\$5,220,038</b>	<b>\$4,859,300</b>

Note: \*excludes paid search and broadband video ads

Source: TNS Media Intelligence, provided to eMarketer, May 9, 2008

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Magazine spending, although a modest \$29.2 million, actually rose 71% in the same time period—and online display ads surged 189% to \$114 million and a 2.4% share of the total advertising budget.

## Consumer Behavior and Attitudes

In 2008, the question for both OEM and dealer marketers is not who is using the Internet to shop for cars, but who isn't? Capgemini reports that 80% of in-market vehicle shoppers go online at some point in their search. The firm reported that percentage was 71% in 2006 and 64% in 2004.

According to Borrell, in-market buyers spend an average of five hours researching vehicles on the Internet—and less time with traditional media. CarGurus, a third-party auto site, reported that online prospective buyers spend more than 60% of their time looking at photos and videos of new cars and the rest of the time reading articles, user reviews, vehicle specifications and pricing.

Even so, according to TNS data, in 2007 automakers were still pouring the majority of their ad budgets, about 60%, into TV. That is money they cannot afford to waste in 2008 and beyond.

For dealers, the Internet dramatically changed the dynamics of selling and servicing cars by offering shoppers transparency in pricing and vehicle specs. Today, consumers expect dealers to respond to e-mail inquiries in about four hours, not four days. They want to schedule service appointments online and check dealer inventory on new and used cars.

In the coming years, more and more consumers will want to conduct the entire buying process online, and dealers will have to provide the tools to facilitate the sale, including links to loan applications and insurance sites.

Web sites will make or break a sale—and an ongoing relationship. Sales contact with new customers will be limited to a one-time showroom visit for pickup—and then continue via the Web site for ongoing promotion and maintenance appointments.

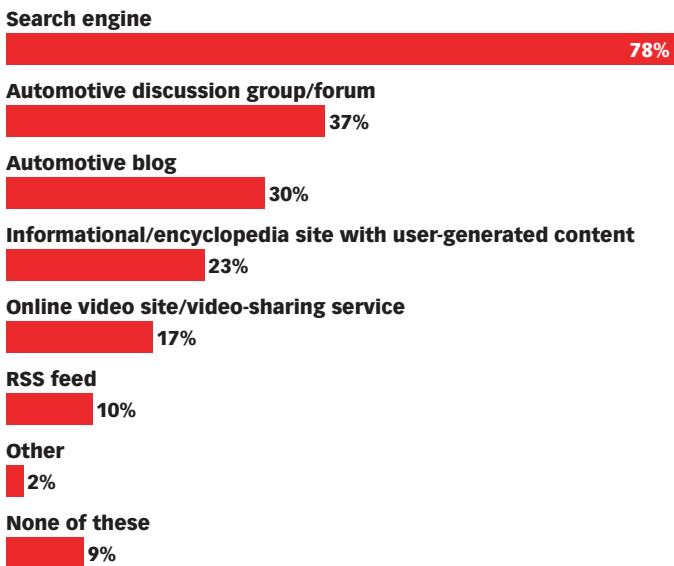
## Online Media Tools

Knowing that millions of potential automobile buyers are online is one thing; understanding which tools to use to reach them is another. But savvy auto marketers are learning.

### Search Engine Marketing

Once online, most people turn to a search engine for auto research. A global survey from Capgemini showed that 78% of respondents visited one.

### Online Tools Used by Internet Users Worldwide When Researching a Vehicle Purchase, 2007 (% of respondents)



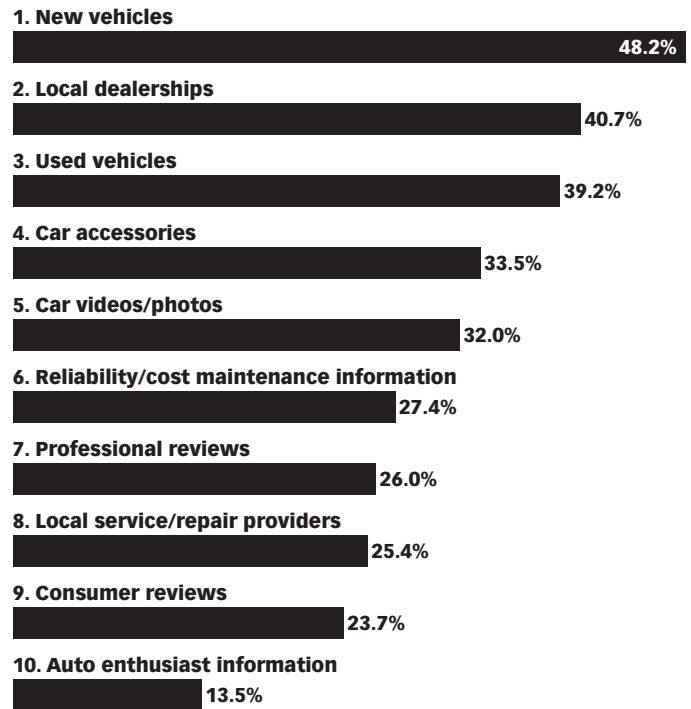
Note: China, France, Germany, UK and US; all respondents were planning to purchase or lease a new or used vehicle in the next 18 months  
Source: Capgemini, "Cars Online 07/08" conducted by SmartRevenue as cited in press release, October 4, 2007

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According to a survey from AutobyteI conducted by Kelton Research, searches for new vehicles topped the list of automotive categories for broadband users. Finding a local dealership was the second-most-popular use of search engines, while used-car searches ranked third.

### Top 10 Automotive Categories Searched Online among US Adult Broadband Users, May 2007 (% of respondents)



Note: n=1,001 ages 18+  
Source: AutobyteI Inc. and Kelton Research (KR), "The State of Search," provided to eMarketer, October 15, 2007

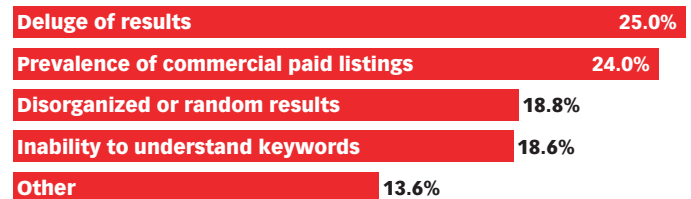
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But shoppers do not always find what they are looking for on major search engines.

One-quarter of respondents said they were overwhelmed by the "deluge of results" returned by searches on Google, Yahoo! and MSN, and nearly the same percentage were turned off by the paid commercial listings that showed up alongside organic results.

### Leading Complaint of US Adult Broadband Users about Online Automotive Information Searching on Large Search Engines\*, May 2007 (% of respondents)



Note: n=1,001 ages 18+; \*Google, Yahoo! and MSN  
Source: AutobyteI Inc. and Kelton Research (KR), "The State of Search," provided to eMarketer, October 15, 2007

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To alleviate the problem, auto marketers need to stop buying keywords that do not describe a new car's features.

*Advertising Age* discussed auto marketers' penchant for buying a competitor's name or keywords like "green cars" or "hybrid" when the automaker did not offer such models. The practice risks alienating in-market shoppers who have defined their needs and are online to research and narrow their choices.

Automotive searchers quickly become disenchanted with auto marketers who try to push vehicles that do not match their criteria for fuel efficiency, passenger seating, engine performance and other features.

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### Social Media Marketing

Every day, conversations that used to take place with friends and family are shifting to the Internet.

Capgemini found that, with the spread of social media, shoppers are now looking for opinions and reviews from total strangers about specific brands, makes and dealers, as well as to discuss their own impressions and experiences.

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### Reasons that Internet Users Worldwide Use Online Tools When Researching a Vehicle Purchase, 2007 (% of respondents)

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#### Opinions/reviews about specific car brands/makes

51%

#### News about new vehicles

37%

#### Helpful hints

33%

#### Opinions/reviews about specific car dealerships

33%

#### Personal stories

23%

#### Discussions with other consumers

21%

#### Discussions with automotive experts

20%

#### Information about vehicle recalls

19%

#### Discussions about a specific automotive topic

15%

#### Information about automotive events/auto shows

12%

#### Spy photos or other car images/videos

9%

#### Other

1%

*Note: China, France, Germany, UK and US; all respondents were planning to purchase or lease a new or used vehicle in the next 18 months*  
*Source: Capgemini, "Cars Online 07/08" conducted by SmartRevenue as cited in press release, October 4, 2007*

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Likewise, the "New Autosshopper.com Study" from J.D. Power found that nearly 69% of online new-vehicle buyers used one or more types of user-generated content. Consumer ratings and reviews were the most popular form, and enthusiast sites, online forums, blogs and photo-sharing sites were considered helpful but had lower usage rates.

A joint comScore and Kelsey Group study showed that 78% of Internet users who read an online review in the automotive category said it influenced their offline purchase decision.

**Offline Purchase Behavior of US Online Consumer Review Readers that Was Significantly Influenced by Review, by Service Category, October 2007 (% of respondents)**

Hotels	87%
Travel	84%
Restaurants	79%
Legal	79%
Automotive	78%
Medical	76%
Home	73%

Note: includes responses of 4 or 5 on a 5-point scale  
 Source: comScore, Inc. and The Kelsey Group as cited in press release, November 29, 2007

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Not surprisingly, Cappgemini found that younger Internet users are more likely to check out automotive blogs. About one-third of respondents ages 18 to 34 did so while researching a purchase, compared with 22% of respondents ages 50 and older.

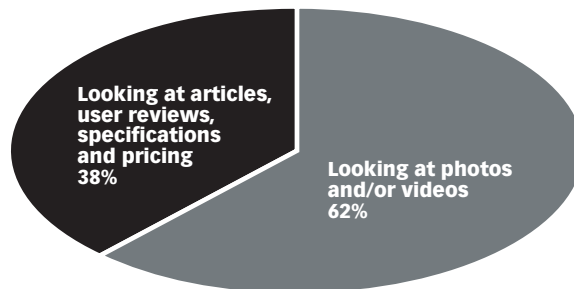
Toyota was an early entrant in the blogosphere, employing staff to, among other things, blog back.

Bruce Ertmann, corporate manager of consumer-generated media, told *Brandweek* he checks Autoblog, Jalopnik, Autoextremist.com and fan sites. As an example, when Al Gore III, son of the former vice president, was pulled over in July 2007 for driving his Toyota Prius at 100 mph, the automaker responded to blog entries about the incident.

"We don't advocate traveling at 100 mph on our nation's highways, or anywhere for that matter in any of our products, but we've also heard from some of our Prius owners that say it's kind of nice to know the car is not a slug at all but has the power to move fast if needed. Just what is the top speed of a Prius? It's actually 103 mph. Buy a Prius—but obey the law," Mr. Ertmann wrote on his blog.

In a six-month study of online behavior conducted in 2007, CarGurus found that new-car shoppers spent a majority of their time online looking at photos or watching videos. Reading articles and user reviews or comparing prices and vehicle specifications occupied 38% of their time.

**Behavior of US Online New Car Shoppers, March-August 2007 (% of time spend on Web pages)**



Source: CarGurus as cited in press release, October 11, 2007

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Toyota's Scion is building buzz via social engagement and community participation. The brand has even gone virtual, as the following case study illustrates.

**Scion Case Study**

One of the most successful brands to tap into the consumer zeitgeist is Toyota's Scion. Aimed at the 18 to 24 year-old set, Scion is designed to recruit young consumers to the automaker.

Scion hardly advertises and does not need to give incentives, a popular tool in clearing dealer lots. Instead, it relies on word-of-mouth and a strong Internet presence. But rather than buy keywords and run banner advertisements, Scion reaches anti-ad consumers by going viral, using virtual worlds, tapping into so-called influencers and even sprinkling in a bit of traditional marketing.

Scion's entrée to the virtual world began in 2006—first in Whyville (demographic: 8 to 14 year-olds), Second Life (30-somethings) and There.com (late teens).

Some of Scion's virtual initiatives:

- Gaia Online. Members buy and build virtual cars.
- Second Life. In Scion City, residents build their cars and choose avatars, as on Gaia.
- Club Scion (There.com). Described as "vehicle exploration" disguised as a night club. A series of interconnected clubs built in the shape of the Scion xA, xB and tC models.
- Whyville. Where users buy and create tricked-out versions of virtual Scion models and learn how cars work. In June 2007, it had a virtual after-party for an avatar version of hip-hop artist tobyMac.

■ Scion.com. Areas devoted solely to registered users, many of whom own Scions, featuring a broadband video and music site with an indie bent. It also supports virtual games on sites like Want2BeSquare.com.

Scion's interactive marketing manager, Adrian Si, told *Mediapost* it does not matter that the brand does not collect money for cars "purchased" online. The important thing is engagement, and the Internet allows marketers to track how many people visited a particular site, what they "bought" and customized as well as what they said about the brand.

Just as Scion lets consumers (virtual and real) design their own vehicles, consumer input helps shape the brand, covering everything from product introductions and pricing to dealer operations.

Launched in 2003, Scion is a niche vehicle—selling 130,000 units last year, according to *AutoWeek*—4% of Toyota's total.

The up-and-coming brand appears to have found the golden goose: entertaining marketing that consumers believe improves their lives rather than intrudes upon them.

### Word-of-Mouth Online

A few short years ago, price and vehicle specs were the main pieces of information sought online. Today, shoppers turn to the Web for recommendations and reviews.

Word-of-mouth has always had a great influence on vehicle purchase decisions, but now the Web—through blogs, user reviews, discussion groups, automotive wikis and other social media—is replacing recommendations from friends and family.

### Media that Influence Automobile Purchases by US Adults, July & December 2007 (% of respondents)

	July 2007	December 2007
Word of mouth	30.8%	30.2%
Reading articles on product	22.9%	21.7%
TV/broadcast	22.7%	20.8%
Newspapers	19.2%	19.5%
Magazines	17.9%	16.5%
Radio	13.8%	14.1%
Cable	14.2%	12.6%
Newspaper inserts	11.3%	11.9%
Direct mail	10.9%	11.6%
Outdoor billboards	10.2%	10.6%
Internet advertising	10.3%	10.2%
In-store promotion	8.2%	8.5%
Coupons	8.3%	8.5%
Product placement	7.0%	7.3%
Yellow Pages	7.0%	7.2%
E-Mail advertising	7.0%	6.7%
Satellite radio	2.8%	3.2%
Web radio	1.8%	2.2%
Blogging	1.9%	2.1%
Instant messaging (computer)	1.6%	2.0%
Videos on cellphone	1.9%	1.7%
Text messaging (cellphone)	-	1.7%

Note: ages 18+; includes cars and trucks

Source: BIGresearch, "Simultaneous Media Usage Study (SIMM) 11" as cited in "Media Multitasking," provided to eMarketer, January 22, 2008

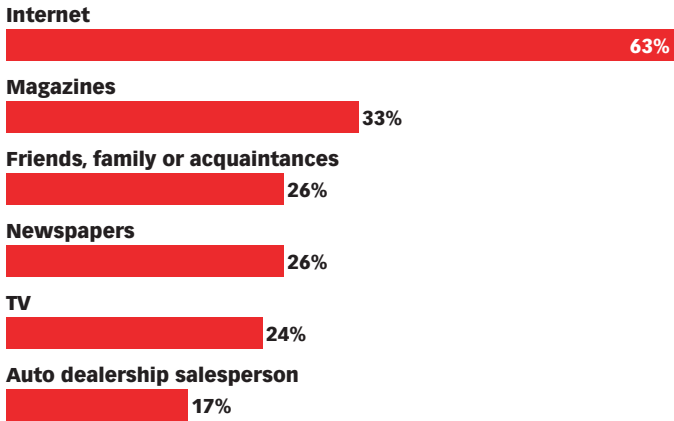
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For the automotive cognoscenti, an important influencer target, the Internet outstrips all other media as a source of information.

A Harris Interactive survey of people who considered themselves “very” or “extremely knowledgeable” about cars found that 63% had used the Internet as a resource for their most recent car purchase, while magazines—presumably enthusiast titles—were a distant second, at 33%. Newspapers ranked only slightly ahead of television.

**Information Resources Used by US Automotive-Influential\* Adult Internet Users for Most Recent Automobile Purchase or Lease Decision, June-July 2007 (% of respondents)**



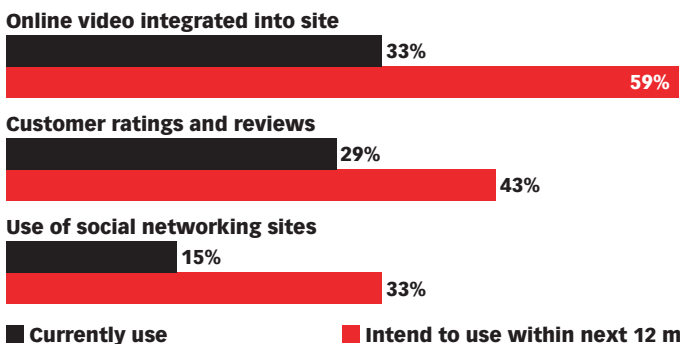
Note: ages 18+ who acquired a new or used automobile in the past year; \*self-described as “very” or “extremely knowledgeable” about vehicles  
Source: Harris Interactive as cited in press release, January 24, 2008

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**Online Video**

Just one-third of auto dealers now use online video on their local sites, but nearly 60% of respondents told the Kelsey Group they planned to add video in the next 12 months.

**Current and Intended Usage of Select Web 2.0 Tactics by US Auto Dealerships, February 2008 (% of respondents)**



Source: The Kelsey Group as cited in press release, March 10, 2008

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Customer reviews were not as popular, perhaps due to fears of negative comments. Likewise, social networks—presumably for the auto enthusiast crowd—were not in great use, but some planned to add them.

Auto marketers are getting the picture. Beyond adding more video to their sites, highlighting their service departments and even the showroom sales experience, a good portion of dealers’ broadcast TV spending is shifting online in the form of broadband video channels sponsored by manufacturers or devoted to new cars.

Borrell expects online video and search ads to dominate the local automotive advertising scene in five years. Online video and search advertising made up just 27% of local automotive online spending in 2007, but by 2012 these two tactics will account for 76% of local auto online ad budgets.

**Online Video and Paid Search Advertising Spending by Car Sellers\* As a Percent of US Total Local Automotive Online Advertising Spending, 2007 & 2012**



Note: \*automotive manufacturers, franchises, dealerships and private sellers

Source: Borrell Associates Inc., “2007 Online Auto Advertising Shifts Into High Gear” as cited by ClickZ, May 10, 2007

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Volvo created a 16-episode online video series, “Mr. Robinson’s Driving School” (featuring Craig Robinson from NBC’s “The Office”), to promote its C30 model. In addition to watching the video, users can participate in driving games.

**OEM Sites on the Rise**

Manufacturers are slowly making inroads online, and dealers are following their lead. According to J.D. Power, shopper satisfaction with the usability of automakers’ sites increased by 6% between 2003 and 2007.

The research firm also found that 47% of new-vehicle shoppers went to independent sites, while 46% visited a manufacturer’s site. The shift is substantial: In 2003, 62% of new-vehicle shoppers went straight to an independent site and only 36% visited an automaker’s site first. The trend continues throughout the shopping process, with online shoppers visiting manufacturer sites more than ever.

A global trend toward manufacturers' and dealers' sites and away from information and independent car valuation services was confirmed by Capgemini data covering 2005 to 2007. In the three-year period, respondents claiming visits to automakers' sites increased 27% and dealers' site visits rose 2%. Meanwhile, the percentage of respondents citing information sites declined 14%, independent e-tailer sites were down 15% and independent car valuation services fell 3%.

**Sources Used by Internet Users Worldwide When Researching Vehicles, 2005-2007 (% of respondents)**

	2005	2006	2007
Information Web sites	55%	54%	41%
Manufacturer-specific franchise dealer	55%	54%	51%
Family and friends	55%	46%	44%
Dealer Web sites	49%	52%	51%
Manufacturer Web sites	43%	64%	70%
Specialist motoring/automotive press	41%	42%	44%
Independent e-tailer sites	36%	36%	21%
Print advertising	32%	23%	20%
TV advertising	31%	29%	29%
Independent car valuation services	27%	29%	24%
Nonspecialist motoring/automotive press	24%	17%	14%
Used car dealer	7%	7%	8%
Financial services broker	6%	6%	6%
Web forums/blogs/Internet discussion groups	-	21%	29%

Note: China, France, Germany, UK and US; all respondents were planning to purchase or lease a new or used vehicle in the next 18 months  
 Source: Capgemini, "Cars Online 07/08" conducted by SmartRevenue as cited in press release, October 4, 2007

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Interestingly, influence from family and friends fell 11%, while Web forums, blogs and online discussion groups, first measured in 2006, gained ground. Traditional media channels such as print and TV ads also showed declining influence, although enthusiast press outlets saw a bump in interest.

Consumers are also limiting the number of manufacturer sites they consult. In 2007, 67% visited four or fewer OEM sites, compared with 57% in 2005. The number of shoppers who checked out five or more automaker sites fell to 34% in 2007 from 44% in 2005.

The list of features these online shoppers are looking for has not changed very much in recent years. Price is still the number-one reason shoppers visit a manufacturer's site, although the number of respondents considering it most important slipped from 52% of respondents in 2006 to 45% in 2007. The ability to compare vehicles and get a full range of product information also remained consistently high.

**Most Important Manufacturer Web Site Features for Researching a Vehicle Purchase according to Internet Users Worldwide, 2007 (% of respondents)**

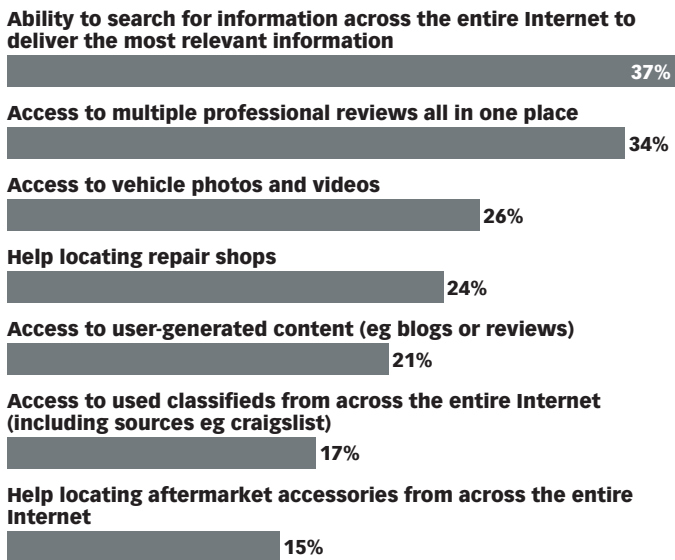


Note: China, France, Germany, UK and US; all respondents were planning to purchase or lease a new or used vehicle in the next 18 months; \*includes transaction price, retail list price and dealer invoice price  
 Source: Capgemini, "Cars Online 07/08" conducted by SmartRevenue as cited in press release, October 4, 2007

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The ideal auto site would give shoppers the ability to find the most relevant information and compile professional reviews "all in one place," according to Autobytel and Kelton Research.

**Features of "Ideal" Automotive Web Site according to US Adult Broadband Users, May 2007 (% of respondents)**



Note: n=1,001 ages 18+  
Source: Autobytel Inc. and Kelton Research (KR), "The State of Search," provided to eMarketer, October 15, 2007

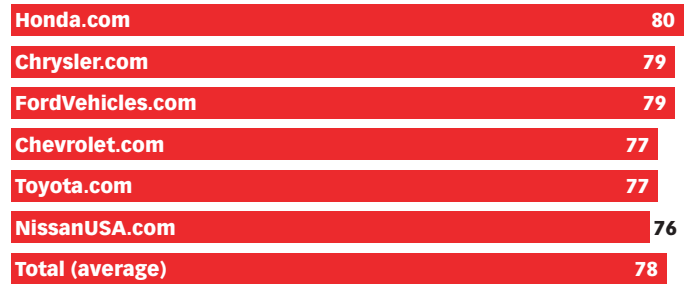
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Less important but still necessary are videos and photos, user-generated content such as blogs and customer reviews, and listings of local repair shops.

Honda's agency, RPA, created a dog-lover's site, DogCars.com, which named the Element (a Honda model) the "Dog Car of the Year" in December 2007. By March, the agency was running ads on dog-centric sites and cable TV showing the Element's functionality from the perspective of dog owners.

Comparing manufacturer sites, ForeSee Results found that Honda did the best job satisfying customers and driving sales and dealer visits. (On a 100-point scale, the industry average was 78. Only Honda, Chrysler and Ford exceeded that measure.)

**US Customer Satisfaction with Select Automotive Sites, 2008 (based on a 100-point scale\*)**

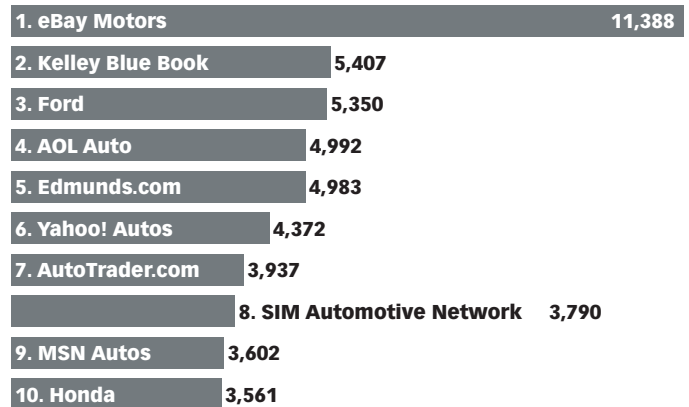


Note: \*using the American Customer Satisfaction Index (ACSI) methodology  
Source: ForeSee Results based on the American Customer Satisfaction Index (ACSI), "Online Customer Satisfaction: Driving Loyalty and Sales in the Automotive Industry," March 31, 2008

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However, in a broader survey of auto sites conducted by Nielsen Online and measuring unique visitors, e-commerce site eBay Motors received double the traffic of the next-closest site, Kelley Blue Book. Ford ranked third, while Honda's site ranked only 10th.

**Top 10 Automotive Web Sites among US Internet Users, Ranked by Unique Visitors, November 2007 (thousands)**



Source: Nielsen Online, "NetView" as cited by Marketing Charts, January 9, 2008

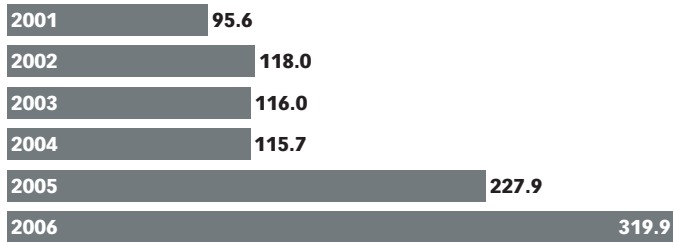
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**Dealers Need to Get up to Speed**

Internet users are finding and engaging local dealers online in growing numbers, and their experiences shape future loyalties. Rapid responses to e-mail inquiries are expected, and appreciated, as is relevant information. A Polk study of new-car buyers found that 68% who received a response purchased a car from the responding dealer.

According to NADA, between 2001 and 2006 the average monthly total of unsolicited Web inquiries to dealerships grew from 96 to 320.

**Average Monthly Total of Web-Site-Generated, Unsolicited Prospects according to US Automobile Dealers, 2001-2006**



Source: National Automobile Dealers Association (NADA), "2006 Dealership Internet Survey" as cited by Internet Retailer, May 2007

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Use of broadband has raised consumers' expectations for rapid response. For auto dealers, that means shoppers and owners want responses to queries faster than ever before—or they will find another dealer. A survey of new-car buyers' online experiences showed that 47% of those who preferred an e-mail response from a dealer thought 10 to 24 hours was an acceptable turnaround time, according to Polk.

These expectations are not limited to the US. Capgemini's survey found that 39% of respondents worldwide expect a dealer or manufacturer to answer their e-mail in four hours or less, with 10% demanding an immediate answer. Only 2% would accept an answer more than two days later.

Slow response times are more costly to dealers—although they can affect a shopper's decision to change manufacturers as well. Almost one-half of all respondents told Capgemini they would look for another dealer if they did not receive a fast enough response.

**Reaction of Internet Users Worldwide to an Automotive Dealer/Manufacturer Taking Too Long to Respond to a Web Query, 2005-2007 (% of respondents)**

	2005	2006	2007
Look for another dealer	43%	51%	48%
Look for another manufacturer	5%	4%	7%
Both	13%	17%	18%
Neither	5%	2%	2%
Call the dealer	23%	15%	14%
Call the manufacturer	2%	1%	2%
Don't know	9%	9%	9%

Note: China, France, Germany, UK and US; all respondents were planning to purchase or lease a new or used vehicle in the next 18 months

Source: Capgemini, "Cars Online 07/08" conducted by SmartRevenue as cited in press release, October 4, 2007

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Some dealers may be driving customers away even when they do respond. Although 38% gave a price quote in their first e-mail response, almost the same percentage asked online inquirers for more information, according to J.D. Power. But including a price quote in the response can increase customer loyalty by 3.4 percentage points, Polk reported.

**US Automobile Dealers' Responses to Online Price Inquiries, May-June 2007 (% of respondents)**

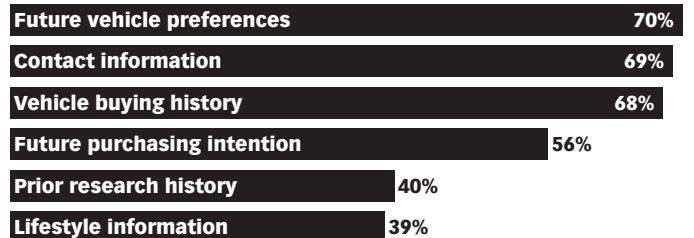


Source: J.D. Power and Associates, "2007 Dealer Satisfaction with Online Buying Services Study" as cited in press release, September 10, 2007

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While Internet users generally are not surprised to be asked for more information, there are only certain types of information they are willing to give to automakers and dealers. Contact information, vehicle preferences and buying history are acceptable. More personal information, such as future purchase intent, lifestyle and research history were considered off-limits by most respondents.

**Information Internet Users Worldwide Are Willing to Share with Manufacturers/Dealers, 2007 (% of respondents)**



Note: China, France, Germany, UK and US; all respondents were planning to purchase or lease a new or used vehicle in the next 18 months

Source: Capgemini, "Cars Online 07/08" conducted by SmartRevenue as cited in press release, October 4, 2007

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Woe to dealers who abuse the privilege of e-mail communications. Consumers want to believe they are getting the most out of the arrangement, and they do not want to be blitzed with marketing promotions.

For all the inroads the Internet has made in the auto-buying process, dealers still have the advantage of being close to their markets. However, more consumers say they are ready to buy a car online.

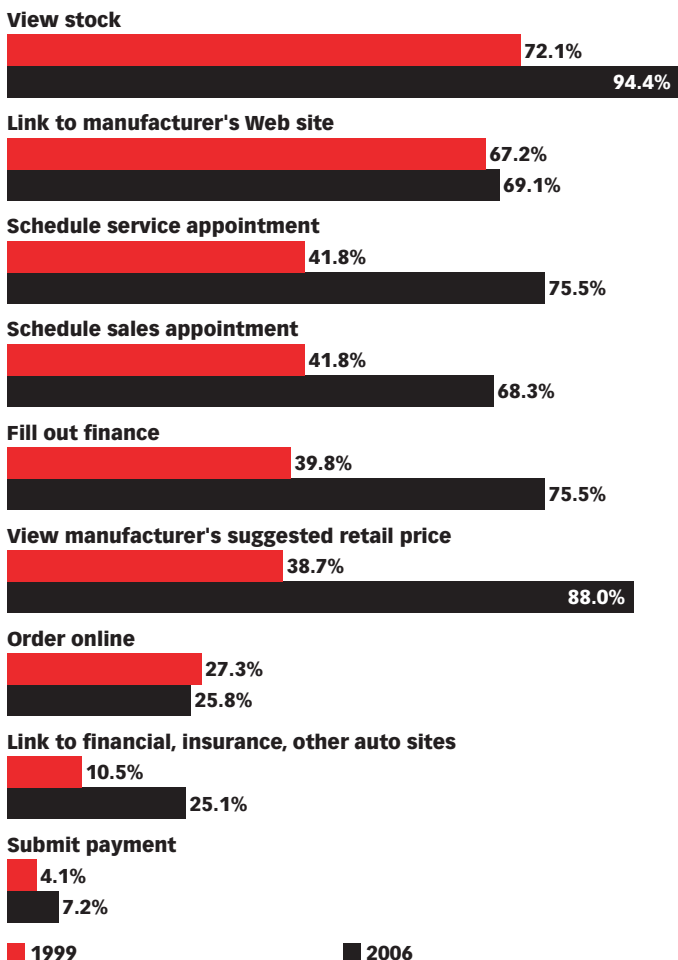
Capgemini found that 20% of respondents were “likely” or “very likely” to buy a car online in 2007, compared with just 2% in 2001. Among those who were very likely, US respondents were most willing at 8%, and Europeans were close behind at 7%.

Third-party sites are well ahead of dealers with e-commerce sales programs. From eBay Motors to Carmax.com—and even Overstock.com—more than 20 third-party sites sell vehicles online, often including everything from online loans to delivery.

Dealers are slowly catching up.

They are adding online features that allow visitors to view inventory, schedule sales and service appointments, fill out finance applications and see the manufacturer’s suggested retail price. However, far fewer—actually, a decreasing number of dealer respondents—offer visitors the ability to order a vehicle online. With pickup presumably scheduled to take place at the dealership, there would still be time to build some customer loyalty into the transaction.

**Web Site Features of US Auto Dealerships, 1999 & 2006 (% of respondents)**



Source: National Automobile Dealers Association (NADA), "2006 Dealership Internet Survey" as cited by Internet Retailer, May 2007

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**Trends to Watch**

**Rough Road Ahead**

As the economy tightens and gas prices continue to soar, consumers will become even more considered in their purchases. More and more people will hold off on buying cars. Those who are inclined to pull the trigger will come face to face with a credit crunch that restricts what they can borrow.

That is a double whammy for automakers, hitting sales as well as financing divisions such as Ford Motor Credit and GMAC.

**A Green Light**

Green will continue to be a hot-button issue, less, perhaps, for environmental reasons than for economic ones.

Autobytel reported that its top 10 requested vehicles in 2007 were fuel-efficient models—even if they are more expensive and smaller than their siblings. And even though trucks and SUVs accounted for one-half of US sales last year, they were missing from Autobytel’s most-requested list.

**Welcome to the Fuel-Economy Economy**

Thanks to Corporate Average Fuel Economy (CAFE) rules bearing down on the industry, most mass-market cars will have to get at least 35 mpg by 2020.

But according to David Cole of the Center for Automotive Research, advances in non-food-based fuels will greatly reduce the cost of filling up a gas tank within the next 10 years. He expects rapid changes in auto design and manufacture—perhaps even by the end of the decade—creating new opportunities and challenges for the industry.

**Boomers Step Off the Gas**

A major concern for the industry is what will happen when 70-some million baby boomers—lifelong gear heads—start retiring and stop buying cars.

Another concern is that many skilled workers will exit the workforce, possibly leaving automakers without enough workers for at least some period of time, according to the Center for Automotive Research.

**Consumer Designs**

With so many of their potential buyers on the Internet, auto marketers have to remain alert for new online developments, good and bad.

They should beware of citizen media and viral efforts to connect with the challenged attention spans of consumers who find something new one day yet shun it the next for being stale.

But they must also be ready to react quickly to true, innovative citizen research and development—input from enthusiasts not on the payroll that could significantly cut costs. Already, many car companies are hiring vice presidents of consumer insights to manage input from devotees, according to one longtime automotive hand.

### Light at the End of the Tunnel

A bright spot is that, in the US, with its century-long love affair with the automobile, the downturn in demand will almost certainly reverse itself once the economy improves—likely with a vengeance, as newly moneyed drivers ditch their old clunkers in favor of the latest and greatest new ride.

## Conclusion

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And now, a few final words about online auto marketing, from Patrick McKenna, manager of marketing communications, BMW of North America.

### eMarketer Interview

**Patrick McKenna, Manager of Marketing Communications, BMW of North America**

**eMarketer:** According to a published report, BMW allocated nearly one-half of its ad budget to online media (an estimated \$15 million to \$25 million) to promote the 1-Series. What's that all about?

**P.M.:** BMW is certainly not new to digital media, but this particular launch is certainly the highest percentage of e-marketing that we've had to date.

We're doing a program on Facebook. Users get to build their own 1-Series and send their model to friends. We're hoping to lure new consumers to the brand, many of whom thought they couldn't afford it.

**eMarketer:** How does this compare with online marketing for other models?

**P.M.:** For other models, we typically don't spend more than 15% of our annual ad budget online.

**eMarketer:** What else are you doing to promote the 1-Series?

**P.M.:** We ran banners on Facebook to download various applications. One was an online graffiti application with a contest, "Draw what drives you." The contest ran from March 29 through April 5. We had 9,046 entries and gave away models, miniatures of the graffiti-inspired cars. People spent hours interacting with this, which is really amazing.

We had a road trip and getaway application that ran in May and a virtual car-key toss. Banners drove traffic to BMW groups on Facebook. We also promoted the program through various Federated Media sites, such as Boing Boing and Lost Remote.

With the road trip, as the originator you can see where the car has been. It's going across the US and the world. It's a really fresh, new look at a road trip. We could easily say here's our recommendation for great driving routes, but we think this plays up the engagement. We'll have virtual road trips from one Facebook page to another. We're not sure how that

will work but the gist is to get the shopper, and his or her friends, involved [with the application] and not to cram the message down their throats.

With the car-key toss, you can toss the keys to the 1-Series to a friend who might have had a tough day and say "have a great drive!"

eMarketer: What are you learning from this type of social media so far?

P.M.: We're learning that there is a real interest in BMW and the 1-Series and that there's an interest in these Web tools. They're relevant and fun. People are willing to spend the time if the idea captures their interest. We looked at Facebook as a great communications vehicle, but we quickly came to the realization that if we ran conventional Internet advertising, it wouldn't be seen as a tool for engagement with our advertising.

eMarketer: What are your biggest challenges in terms of building and implementing effective online marketing programs?

P.M.: We've been really fortunate. We have agencies working with us that are trying to push the limits. We're doing things that have never been done before and that's one of the goals we set for ourselves. We don't just want to run a conventional ad on Facebook or Yahoo!. The agencies and the media partners have helped us understand the parameters. For example, on MSN when the car drives onto the screen, all the attributes of the car spin out and land next to sports and news headlines. For a few seconds, we have infiltrated the editorial.

## Related Information and Links

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### Related Links

#### American International Automobile Dealers Association

<http://www.aiada.org>

#### Capgemini

<http://www.capgemini.com>

#### J.D. Power and Associates

<http://www.jdpower.com>

#### National Automobile Dealers Association (NADA)

<http://www.nada.org>

#### R.L. Polk & Co.

<http://www.polk.com>

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**eMarketer** serves as a trusted, third-party resource, cutting through the clutter and hype—helping businesses make sense of the numbers and trends. **eMarketer's** products and services help companies make better, more informed business decisions by:

- Streamlining research sources and reducing costs
- Eliminating critical data gaps
- Providing an objective, bird's eye view of the entire landscape
- Better deploying and sharing information across the company
- Building solid business cases backed up by hard data
- Reducing business risk
- Saving valuable time

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