

AUTOINTELLIGENCE™

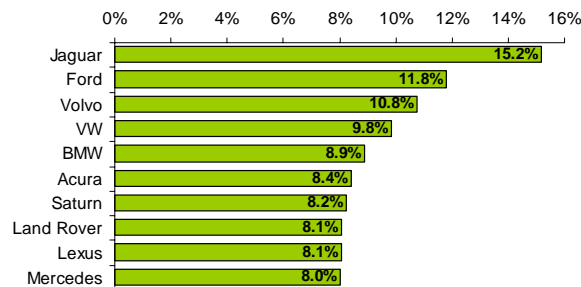
Monthly automotive competitive insights from Compete

WHO IS BENEFITING FROM THE NFL? (PART 1 OF 3)

Automotive marketers have always been driven by the appeal of the NFL. Many OEMs sponsor different aspects of the television coverage such as pre-game, halftime, Super Bowl, etc. There are online sponsorships as well such as Lexus Play Caller game on ESPN.

Throughout the NFL season, Compete will be tracking OEM-site visitors' NFL interest. The first is our pre-season look ranking the top-10 OEM-sites in July based on overlap of OEM-site visitors to a NFL Behavioral Segment. Compete has created this custom segment based on visits to the NFL sections of ESPN and Yahoo Sports.

Top-10 OEM-Site Overlap with NFL Content Areas
ESPN and Yahoo Sports (NFL content areas)



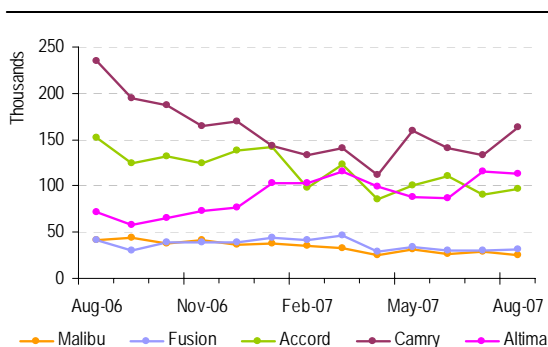
In July, seven of the top-10 brands were luxury makes. Although most OEMs advertise on the NFL in some form, Lexus was the only brand in the set that currently has a television and online sponsorship.

Compete will report back mid-season to see if the rankings have changed and then again at the end of the season. Stay tuned.

WILL GM RIDE THE MALIBU WAVE?

General Motors will be launching the all new '08 Chevrolet Malibu in November behind a reported \$100 million marketing blitz trumpeting the sedan's re-launch. The Malibu, which is critical to GM's recovery plan, is up against some tough rivals in the ultra-competitive mid-size sedan market, most notably Camry, Accord and Altima as well as Ford's Fusion

Mid-Size Car Shopper Counts
August 2006 – August 2007

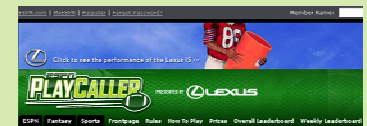


Compete's shopper data shows Malibu demand has lagged key import rivals. Camry, Accord and Altima have led the mid-size segment with over 100,000 shoppers per month while Malibu has averaged approximately 34,000 shoppers per month over the past year. August shopper counts declined to 25,600, a near period low.

At the same time, Malibu has not generated significant interest among rival shoppers. Compete cross-shop data indicates that Malibu does not typically penetrate the top 10 cross-shop set of its key rivals. In fact, import shoppers cross-shop about 30 vehicles to a greater extent than Malibu.

To be successful in the mid-size sedan segment, Malibu must generate interest among competitive shoppers, especially those shopping Camry, Accord and Altima. Increased cross-shopping among rivals will generate additional Malibu demand and make it more likely that sales goals will be achieved. However, that task will be put to the test as Malibu will be going head-to-head with the all-new '08 Accord.

Lexus was the only major NFL sponsor that made the top-10 overlap list in July.



Compete provides automakers with the most detailed and immediate insights into vehicle demand generation and conversion, as well as vehicle and brand competitiveness. Our services help automakers optimize marketing and incentive decisions and benchmark performance against rival actions.

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autoppractice@compete.com

