AUTOINTELLIGENCE: THE ONLINE CHANNEL™

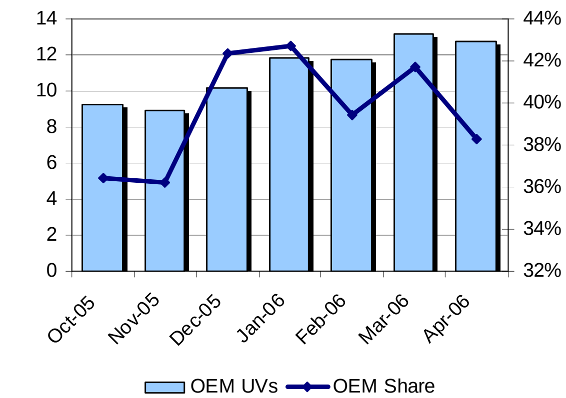
Automotive online competitive insights from Compete

OEM SITES GAIN VISITORS, LOSE SHARE

Since October, the total number of unique visitors (UVs) to OEM websites in aggregate has trended upwards, from a low of 8.96 million in November to 13.16 million in March and 12.72 million in April. Compete assessed whether the aggregate increase on OEM sites bettered or trailed the number of automotive UVs overall. The number of aggregate UVs to OEM sites excludes double-counting (a consumer visiting multiple OEM sites in the month is counted only once). OEM sites here include divisionally-branded, non-exotic sites (e.g., Pontiac.com) but exclude corporate parent sites (e.g., GM.com).

OEM sites in aggregate have lost ground relative to the market since December. In April, 38% of total automotive UVs visited one or more OEM sites, down from 42% in December and 43% in January. Total automotive UVs is based on unique visitor counts across OEM sites plus the leading 11 third-party automotive sites, with no double-counting of consumers that visited more than one site (OEM or third-party) in a month.

UNIQUE OEM VISITORS (MILLIONS, LEFT), OEM SHARE OF ALL AUTOMOTIVE ONLINE (RIGHT)



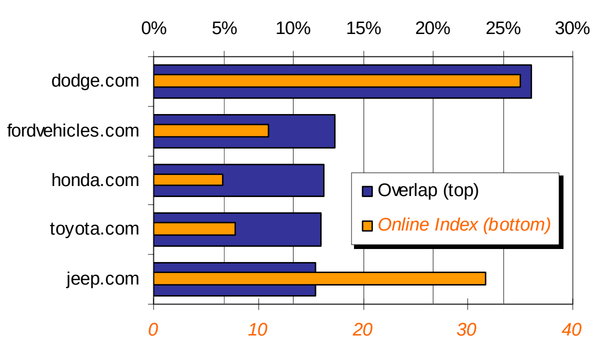
Automakers need to compare OEM site performance in aggregate to their sites' performance to best measure online advertising effectiveness. For example, to evaluate the effectiveness of online ads, OEMs need to know the extent to which changes in the number of UVs on its site were market-driven (across all OEMs) vs. advertising-driven (unique to its site).

Importantly, OEMs need the context of total automotive visitors (OEM and OEM + third party) and the relative effectiveness of OEM sites in capturing online automotive visitors to identify shifts in overall consumer behavior as they happen.

CHRYSLER.COM OVERLAP WITH DODGE.COM MEANS LOWER SALES POTENTIAL

One way OEMs can drive sales is to minimize the extent to which visitors to their branded online channels visit other OEM channels (avoiding shopper defection). Compete assessed the extent to which unique visitors to chrysler.com in April also visited other OEM sites. April's top five OEM sites are shown; the list excludes third-party and non-automotive sites. Unique visitors does not double-count consumers that visit a site more than once in the month, even in separate sessions.

SHARE OF CHRYSLER.COM UNIQUE VISITORS THAT VISITED OTHER SITES SHOWN AND INDEX, APRIL 2006



About one quarter of all chrysler.com unique visitors also visited dodge.com in April. This means that the combined purchase request potential from the Chrysler and Dodge channels is less than the sum of each site's traffic (because many shoppers visited both). The Online Index (orange) shows that chrysler.com visitors visited dodge.com 35 times more than the online visitors in general (automotive and non-automotive).

Understanding consumer interplay across sites is one way to identify relative defection risks as well as spillover opportunities. Quantification of those allows the development of targeted tactical and strategic responses. Ongoing intelligence monitors the success of responses.

OEM share loss means that the automotive online market has been growing faster than OEM site traffic

Compete provides contextual automotive online intelligence framed in the most detailed and immediate insights into online advertising effectiveness, site effectiveness, and channel synchronization. Our services help automotive online executives optimize content, tool, and marketing decisions and benchmark performance against rival actions.

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