

Digital Facts

Automobiles

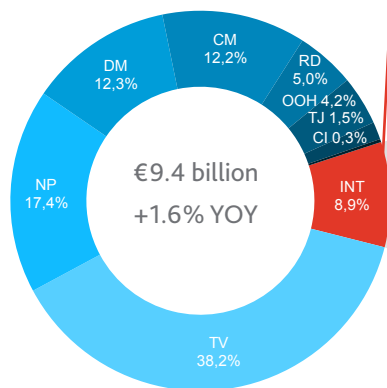
- Cars are the top driver of Internet advertising
- Cars are strong in mobile display advertising
- One in every ten Internet users visits auto manufacturer sites
- Nine out of ten users of Audi's new car configurator are men
- Advertising pressure and social media posts for electric and hybrid models are growing



Top advertising market developments

Gross advertising expenditures 1-4/2012

Advertising market overall



+16.3% Internet advertising shows the strongest growth in per cent
€838 million total advertising expenditure for traditional Internet advertising

Top 3 Internet drivers

1. **Automobiles** +€21.4 million
2. **Company Advertising** +€14.1 million
3. **Financial Services Private Clients** +€7.7 million

Cars increase Internet spendings by **80.2%**

Cars is the **4th** biggest product group on the Internet

Cars is also the top driver in the overall advertising market and currently the top product group driving advertising in above-the-line media

Source: Nielsen Advertising Statistics

Cars drive advertising on the Internet

In the period from January to April 2012, advertising expenditures on the German advertising market totaled €9.4 billion. This represented an increase of 1.6% or €143.6 million compared to the same period in the previous year.

Of all advertising media, the Internet showed the strongest growth propor-

tionally. The advertising expenditures for inserting Web banners on the Internet increased 16.3% or €117.3 million to a total of €838 million.

In absolute terms, the strongest driver of Internet advertising in the period from January to April 2012 was the automotive product group. To promote their automotive models, auto manufacturers

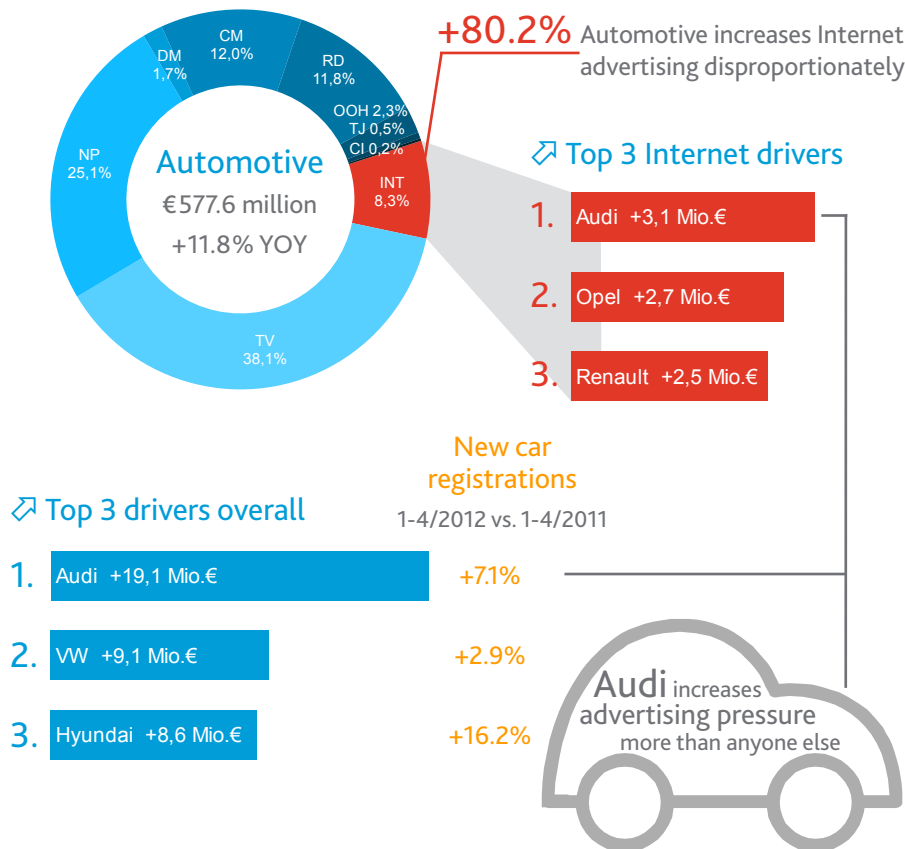
increased advertising on the Internet by €21.4 million or 80.2% to €48.1 million, making them the fourth-strongest advertising product group on the Internet.

Collectively, auto manufacturers also increased their advertising expenditures more than anyone else and had a 42% (up €60.2 million) share in the growth of the overall advertising market.

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Automotive product group – media mix and top drivers

Gross advertising expenditures 1-4/2012



Source: Advertising data, Nielsen Advertising Statistics; New car registrations, Federal Motor Transport Authority (Kraftfahrt-Bundesamt, KBA)

Audi is responsible for the greatest increase of advertising pressure in the auto market

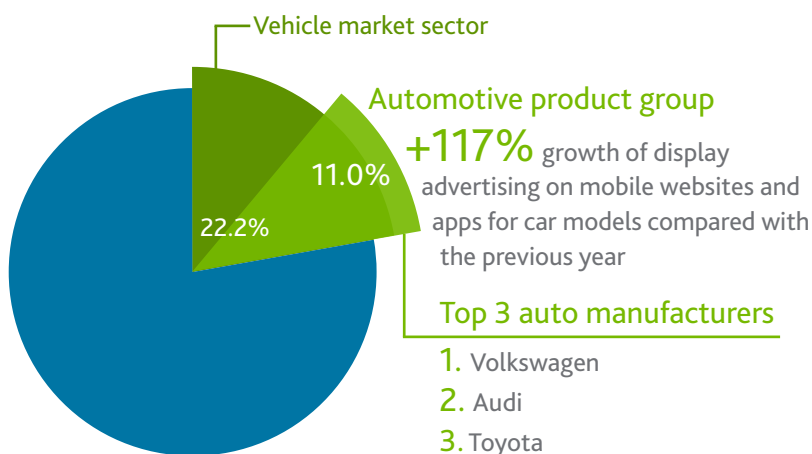
While auto manufacturers increased the advertising pressure for their models by 11.8% to €577.6 million in the period from January to April 2012, according to the Federal Motor Transport Authority, new registrations in the same period were up 1.8% compared to the previous year.

By a wide margin, Audi increased monetary advertising the most to promote its automotive models. With an increase of €19.1 million, Audi almost doubled its advertising expenditures from January to April 2012 compared to the previous year. The largest shares were dedicated to promoting the A1 compact car and the A4 Avant station wagon.

With a share of 38.1%, the greatest share of automotive advertising was still on television, but a significantly greater percentage of the additional money auto manufacturers invested in advertising went to the Internet. Here, too, Audi showed the greatest growth.

Mobile display advertising

Gross advertising expenditures 1-4/2012



Source: Nielsen Advertising Statistics

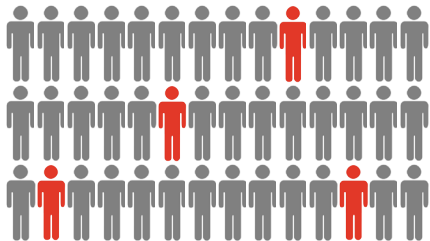
Strong increase of mobile advertising campaigns for cars

There was also an increase of mobile campaigns advertising car models. In the first four months of 2012, advertising expenditures by auto manufacturers for display advertising on mobile websites and apps increased by 117% compared with the same period in the previous year. This makes the automotive sector a strong driver of the mobile advertising market, which saw overall growth of 76% in the period under consideration. In the automotive product group, Volkswagen and Audi were the leading users of this method of addressing the target group.

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Auto manufacturers on the Internet

Website visitors in the auto manufacturer category in April 2012



— **One in every ten** Internet visitors went to an auto manufacturer's website

4.8 million users overall were recorded by auto manufacturers' Web offerings in April

Top 5 websites

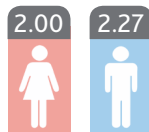
- 1 **Volkswagen**
865,601 users / 1.89% active reach
- 2 **BMW**
593,174 users / 1.29% active reach
- 3 **Mercedes-Benz**
496,803 users / 1.08% active reach
- 4 **Opel**
427,585 users / 0.93% active reach
- 5 **Audi**
410,567 users / 0.89% active reach



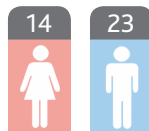
Men visit auto manufacturer websites more often and longer



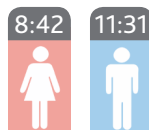
Sessions per person



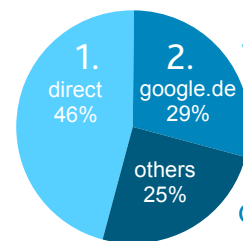
Pages per person



Duration of visit in minutes



Top 2 source of traffic



46% of the visitors to auto manufacturer websites go directly to the offering

29% arrive via a Google search

Range of 1:04 minutes for Lexus to **21:28 minutes** duration of visit at **Audi**

Highest number of average pages per person is **43**, at **Audi**

Source: Nielsen NetView

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Almost every other visitor calls up automotive websites directly

Examining the Internet presence of auto manufacturers shows that these sites were well used: In April 2012 auto manufacturers recorded a total of 4.8 million visitors to their websites. This means that every tenth active Internet user in April visited an auto manufacturer's website at least once.

46% of users called up the website of the respective auto manufacturer directly, while 29% arrived via a Google search. The rest were led there via various links on sites, including via advertising banners inserted on the Internet.

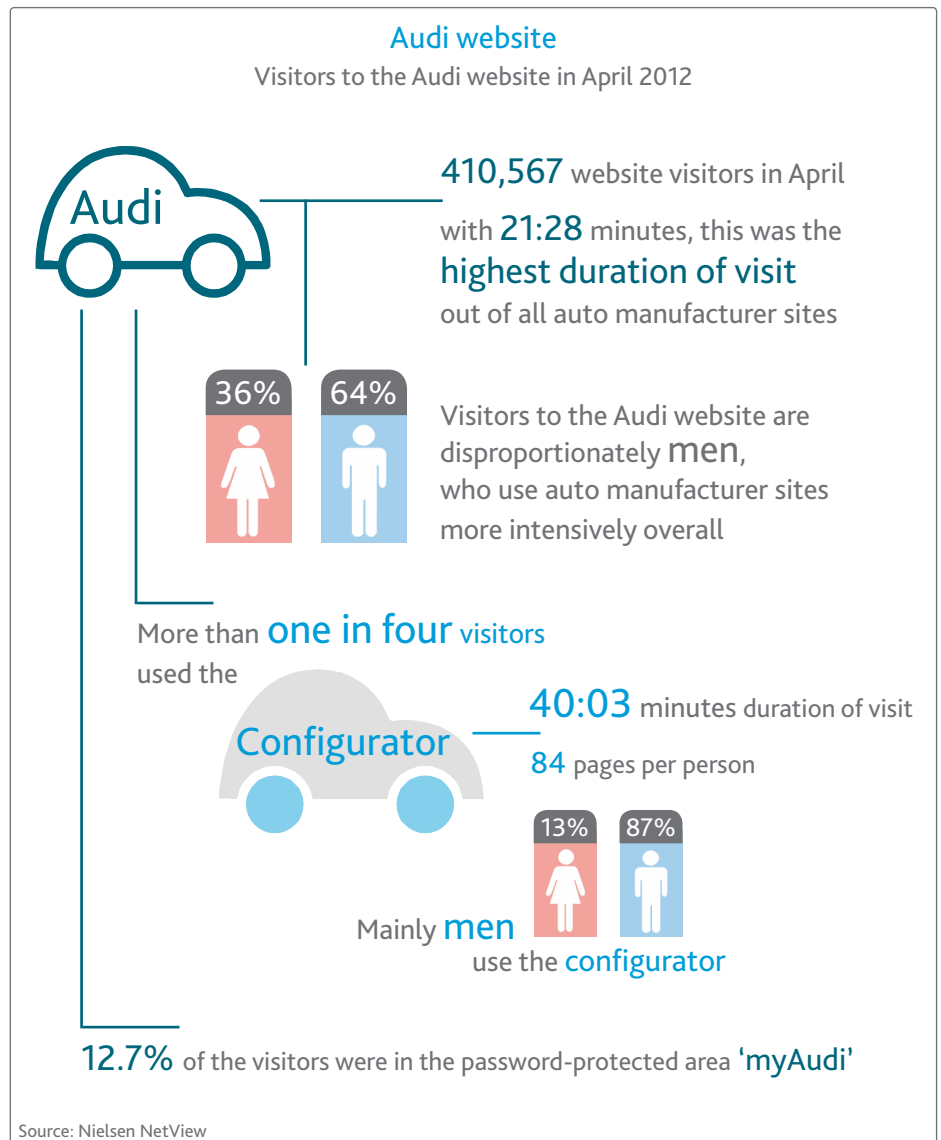
Volkswagen recorded the most visitors in the auto manufacturer sector in April 2012, followed by BMW and Mercedes-Benz. 865,601 visitors, meaning 1.89% of active Internet users in April, went to the Volkswagen website.

Men use car websites more often and more intensively

An average of 59% of visitors to auto manufacturer websites were men, meaning that men were disproportionately represented on these pages compared to the structure of all Internet users.

In addition to representing the largest percentage of visitors to automobile manufacturer websites, men also use them more intensively than women. While visitors called up the Internet presences of automobile manufacturers an average of 2.16 times in April 2012, male visitors went to the respective offering an average of 2.27 times. Men also spent more time here and called up more pages.

The average duration of visit on automobile manufacturers' websites in April was



10:21 minutes, with a very wide range. While Internet visitors to the Lexus website stayed for an average of 1:04 minutes, they stayed at Audi for an average of 21:28 minutes.

Audi has higher duration of visit with new car configurator

Audi's website, which recorded 410,576 visitors in April 2012, not only exhibits the highest average duration of visit in the automobile sector, but also the highest average number of page views, at 43.

With 64%, this represents the disproportionately higher share of male users at Audi, who use automobile websites more intensively overall.

More than one in every four Audi Internet visitors used the configurator, which allows the user to put together a car according to custom specifications. The share of male users of the configurator was 87%, which was again higher, as was the average duration of visit, at 40:03 minutes.

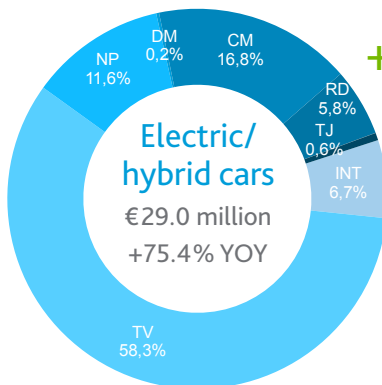
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Electric and hybrid cars

Gross advertising expenditures 1-4/2012

5.0%

of the entire advertising pressure for automotive were allotted to **electric** and **hybrid models**



+75.4% more advertising investments for electric and hybrid cars

+133% advertising pressure on the Internet

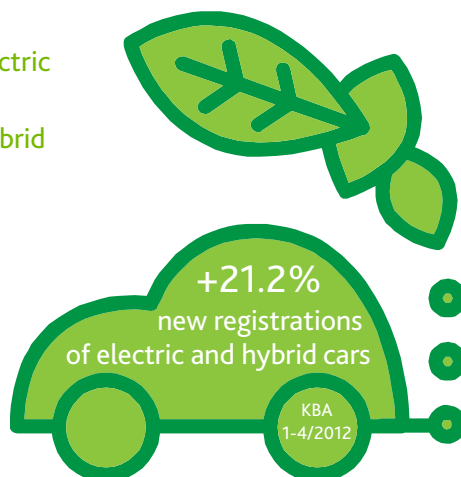
Top 5 companies

Advertising expenditures / Overall share at the company

- 1 Toyota (including Lexus)**
€11.3 million / 29.1%
- 2 Citroën**
€7.4 million / 25.9%
- 3 Opel**
€4.8 million / 12.7%
- 4 Renault**
€3.5 million / 8.9%
- 5 BMW**
€1.3 million / 6.4%

Top 5 individually advertised electric and hybrid models

- 1 Citroën DS5 Hybrid**
€7.4 million
- 2 Lexus CT 200 Hybrid**
€5.1 million
- 3 Opel Ampera Electric**
€4.8 million
- 4 Renault Twizy Electric**
€3.0 million
- 5 BMW 3 Series Hybrid**
€1.3 million



Not only advertising pressure and new registrations of electric and hybrid cars are showing significant growth. **Discussions** by Internet users in **social media** about this topic are also **increasing appreciably**.

Source: Advertising data, Nielsen Advertising Statistics; New car registrations, Federal Motor Transport Authority (Kraftfahrt-Bundesamt, KBA)

Electric and hybrid market gaining importance

While auto manufacturers increased their advertising investment by 11.8% in the first four months of the year compared with the previous year, proportionally their increase of advertising pressure for their electric and hybrid models was significantly stronger. With a growth rate of 75.4%, 5.0% of overall automobile advertising expenditures were allotted to electric and hybrid models. If only April 2012 is considered, the share is already 8.7%.

In the period from January to April 2012, the auto manufacturers Toyota and Citroën invested the highest percentages of their automobile advertising expenditures, with over a quarter of total spendings, in electric and hybrid vehicles. These two companies also exerted the highest advertising pressure in this segment in absolute terms, while Audi, for example, did not advertise its electric and hybrid models during the period under consideration.

The topic of electric mobility is also gaining social significance due to the promotion of new technologies through government specifications, and currently also has a high degree of media presence. On the Internet, the growing volume of discussions in social media on the topic of electric and hybrid mobility also provides evidence that these vehicles are becoming increasingly important.

However, consumers are currently still very cautious about buying electric and hybrid vehicles. According to the Federal Motor Transport Authority, in the period from January to April 2012, new registrations of hybrid cars were up 23.4%, while those of electric cars were up 10.0%, but the overall level remains low. Together, electric and hybrid cars accounted for 0.6% of all new car registrations.

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Significance of social media in the decision to purchase a car

 **64%** of consumers in Germany **trust consumer opinions posted on the Internet** absolutely or completely

 **44%** of consumers indicate that it is very likely or likely that their next **purchasing decision** regarding **automobiles** will be based on online product discussions/social media websites

Source: Nielsen Global Trust in Advertising Survey, Q3 2011; Nielsen Global Survey Social Media, Q1 2012

Online discussions influence the purchasing decision for automobiles

If consumers are asked which (advertising) recommendations they trust, recommendations by people they know are in first place. Nine of ten people surveyed rely on recommendations from family and friends. However, consumer opinions posted on the Internet are in second place. 64% trust social media, while editorial content and different forms of advertising come after this.

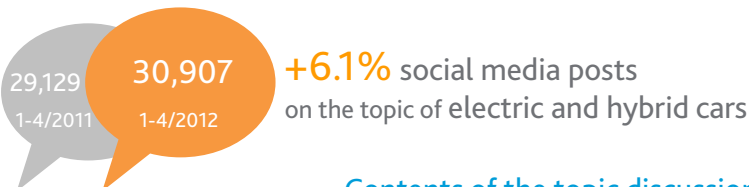
This trust is shown in the purchase decision process: For 44% of people surveyed, the decision for a future car purchase is very likely or likely to be based on online reviews. Consumers find a large number of social media posts to shape their opinion. In the period from January to April 2012, alone, there were 579,478 posts mentioning an automobile brand.

Electric and hybrid cars are frequently discussed online

In the period from January to April 2012, 30,907 social media postings were made on the topic of electric and hybrid mobility, which is 6.1% more than during the same period in the previous year.

Among the top sources with the most postings on this topic were technical forums, but also platforms that primarily deal with general interest topics. The ranking by the microblogging service Twitter is cited, in which news and trends on electric mobility as well as market-related studies are distributed. In contrast, in forums the advantages and disadvantages of specific vehicle models are discussed, as well as the development of electric mobility in general.

Social media posts on the topic of electric and hybrid cars



Top 7 sources

Social media posts 1-4/2012

- 1 **twitter.com**
5,890 posts
- 2 **motor-talk.de**
2,932 posts
- 3 **meinews.niuz.biz**
2,925 posts
- 4 **photovoltaikforum.com**
1,893 posts
- 5 **facebook.com**
1,293 posts
- 6 **flickr.com**
538 posts
- 7 **haustechnikdialog.de**
529 posts

Contents of the topic discussion Electric/hybrid mobility¹⁾

32% of the posts discuss **environmental friendliness**, which is the most heavily promoted aspect in the advertising.

However, **technological** and **financial** aspects predominate, at **54%** and **44%** respectively. These aspects are usually assessed critically.

Almost **1/4** of users mention the **purchase price**, which most find to be **too high**.

In **46%** of the posts the users refer to a **specific brand**.

6% of the users who express an opinion about electric and hybrid mobility **have driven one of these vehicles previously**.



 **Read more** about this topic in the Nielsen/NM Incite Study **"Consumer Acceptance of Electric Mobility,"** which compares advertising communication and online discussion in detail

1) Assessment period: 01/01/2011 - 02/29/2012

Basis: German-speaking social media posts on the topic of electric mobility in social communities such as forums, blogs, Facebook, Twitter and video platforms.

Source: NM Incite (A Nielsen/McKinsey Company)

About this report

The basis for this study is data on Internet use from the Nielsen NetView Panel, analyses for social media by NM Incite and Nielsen's advertising data.

NetView

NetView is a Nielsen service for recording the use of the Internet and applications on the basis of a representative panel of 25,000 people. The measurement is performed by means of patented software installed on the panelists' computers.

The complete click stream on the URL level is recorded, as well as video and application use of the respective individuals in the household. The most important key figures here are the unique audience (visitors) and the duration of visit.

Social media analyses

NM Incite (A Nielsen/McKinsey Company) uses social media as the world's largest focus group to answer various marketing and market-research questions. Experienced research analysts browse, structure and analyse social media such as blogs, forums, Facebook and Twitter.

Right now no medium is growing faster than social media. Millions of consumers are online everyday to express their opinions, share their ideas with other people, and to gather information on subjects and products. In this way users mutually influence each other in their purchasing decisions as well as in the assessment of products, brands and companies.

For the current analysis, the comments were gathered from the entire NM Incite database. They contain posts from forums, blogs, Facebook, Twitter, YouTube, Flickr etc.

Advertising statistical data

The gross advertising expenditures indicated are based on Nielsen Advertising Statistics. The following media classes were included in the analyses:

- Television
- Radio
- Newspapers
- Consumer magazines
- Trade journals
- Out of home (posters, transport media, and at-retail media)
- Cinema
- Internet
- Direct mail

The advertising expenditures correspond to the gross insertion charges, which in direct mail is equal to the postal charges.

Comparisons with the previous year

The changes shown compared with the previous year are adjusted comparisons. Methodological changes were excluded, while natural developments on the media market, such as launches or discontinuations, are retained.



Legend

- Above-the-line media = overall advertising market without direct mail
- Active reach = share of all active Internet users
- DM = direct mail (advertising by mail)
- TJ = trade journals
- Overall advertising market = television, radio, newspapers, consumer magazines, trade journals, out of home (posters, transport media, and at-retail media), cinema, Internet and direct mail
- INT = Internet
- CI = cinema
- OOH = out of home (posters, transport media and at-retail media)
- CM = consumer magazines
- RD = radio
- TV = television
- YOY = year on year (adjusted comparison with previous year)
- Advertising expenditures = gross insertion charges; for direct mail this corresponds to the postal charges.
- NP = newspapers

About Nielsen

Nielsen Holdings N.V. (NYSE: NLSN) is a global information and measurement company with leading market positions in marketing and consumer information, television and other media measurement, online intelligence, mobile measurement, trade shows and related properties. Nielsen has a presence in approximately 100 countries, with headquarters in New York, USA and Diemen, the Netherlands.

For more information, visit:

www.nielsen.com

Contact

Nielsen Media Research GmbH

Sachsenstrasse 16

20097 Hamburg, Germany

t: +49 (0) 40 - 236 42-0

f: +49 (0) 40 - 236 42-122

e: info@nielsen.com

Tanja Panten

t: +49 (0) 40 - 236 42-347

f: +49 (0) 40 - 236 42-122

e: tanja.panten@nielsen.com

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European consumers have a stronger reaction to mobile advertising than U.S. consumers

One third of users in Germany have already purchased online following mobile advertising

Surfing in front of the TV: Worldwide trends in dual screening

Americans are the world champions of using TV and mobile devices in parallel

Over one quarter of users in Germany use tablet computers even while they are watching TV

Coverage of movie portals, social media posts, and visitor numbers at the movies are connected

Shopper Sentiment: How Consumers Feel About Shopping In-Store, Online, and via Mobile

Visit us at the



on 12 and 13 September in Cologne
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