

biletts an Ebiquity brand Media Monitoring

Low Carbon Vehicle Partnership Car Manufacturer Advertising Survey 2007

Background to the Survey

To provide an evidence base on car advertising in the UK in order to enlighten debate among the LowCVP's members regarding policy development and review of the various codes of conduct relating to car advertising in the UK.

LowCVP Project Brief





To provide unbiased data collection and analysis of trends in Automotive advertising relating to CO₂ emissions and environmental messages.

Introduction to Ebiquity

What the company does:





- BMM Ad Tracking
- MIM Media Auditing
- Newslive News Monitoring
- epublisher ad vouching for regional press

Ebiquity Automotive client list:

• Ebiquity currently works with:

















Survey methodology overview

BMM Objectives for 2007 study:

- To monitor and report on trends in marketing communications within the automotive sector, covering:
 - 1. All car manufacturers and car dealerships that partake in press advertising in 2007 within National Newspapers (as defined by BMM)
 - 2. A specific focus on car advertising with respect to CO₂ emissions based upon the product advertised and its associated CO₂ emissions VED Band
 - 3. Identify the prominence of environmental messages within car advertising across National Newspapers and TV advertising.
- The classification and analysis has been conducted impartially and exclusively on behalf of Low CVP and their members

What the survey covers:

- All Automotive Advertising within National Newspapers across 2007
- The survey reports share of voice of estimated advertising spend* broken down primarily by:
 - Car segment A-I +Z Range
 - VED Bands A-G
- Where an advert covers a range of CO₂ VED bands or car segments then the advertising spend of that advert will be weighted between the CO₂ VED bands and their related vehicle segments, manufacturer and model
- The weighting is based on volume of sales i.e. in proportion to the sales volume of the total sales in each segment or CO₂ VED band.
- Volume of sales supplied by the SMMT based upon car registration data for 2007

^{*}Advertising spend is based on the ratecard value supplied directly from National Newspaper publishers.

Key Message process overview:

 BMM analysed the prominence of different types of messages in car adverts across Press and TV based on the following key messages:

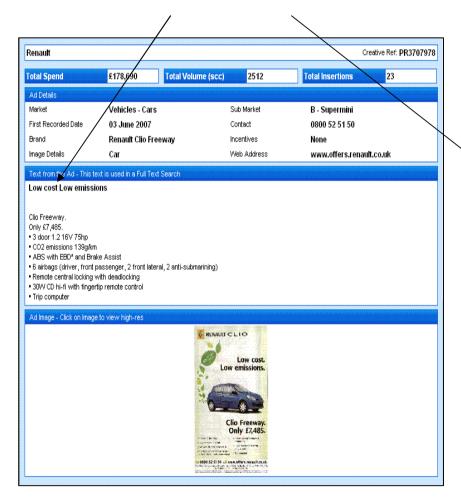
Aspirational, CO₂ / Climate Change, Creature Comforts, Economy, Environment, Lifestyle, Look/Design, Performance, Reliability, Safety/Security, Sustainability, Utility, Value/Price

Press Process:

- By inputting sophisticated search terms into the BMM system it is able to pinpoint "key messages" appearing in manufacturer adverts.
- To contextualise the key message search, creative examples have been included (see below), covering the top 4 key message searches by number of unique ads.

CO₂/Climate Change example search term:

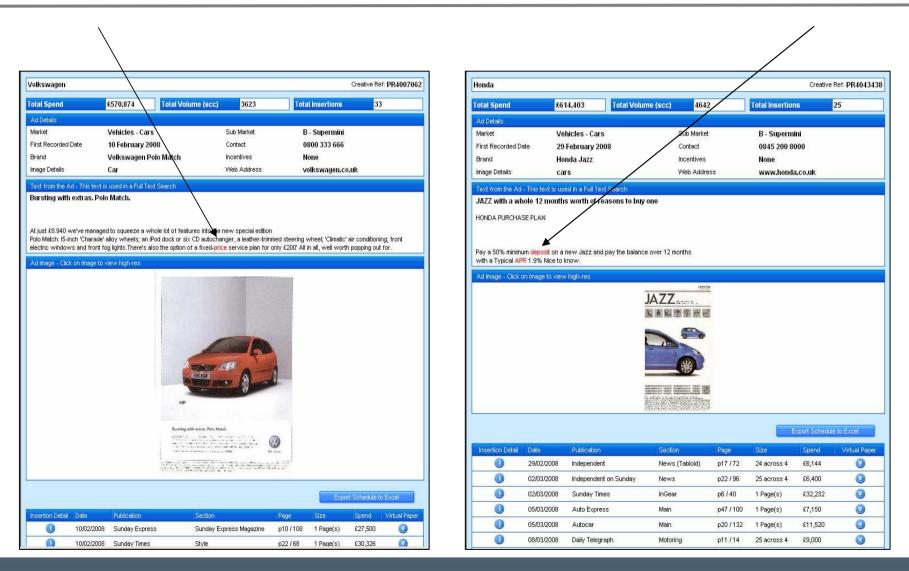
(("co2" or "C02" or "emission*" or "carbon dioxide" or "climate change" or "greenhouse" or "carbon"))





Value/Price example search term

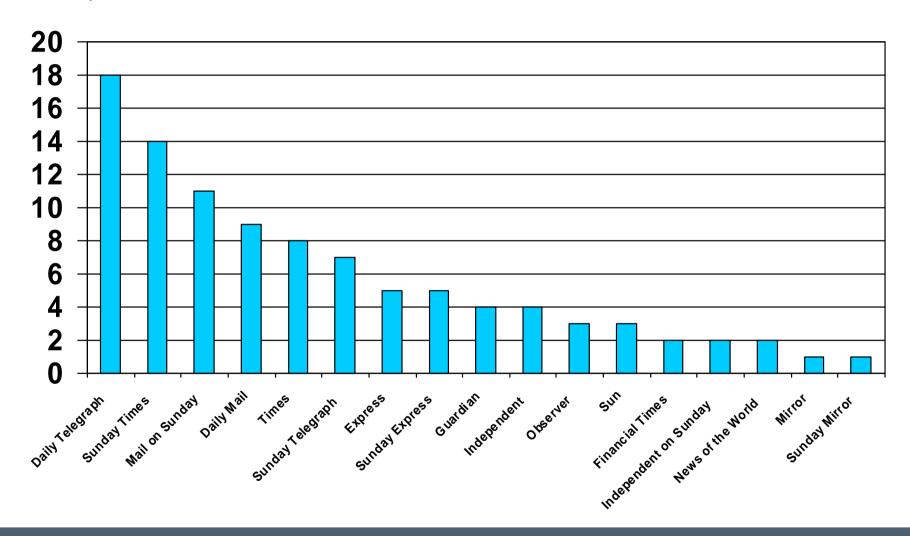
"Price" or "for just" or "easy payments" or "monthly payments" or "Per month" or "low insurance group" or "free" or "starting at" or "afford" or "cashback" or "moneyback" or "save" or "apr" or "money off" or "offer" or "deposit"



Results for National Newspaper Analysis 2007:

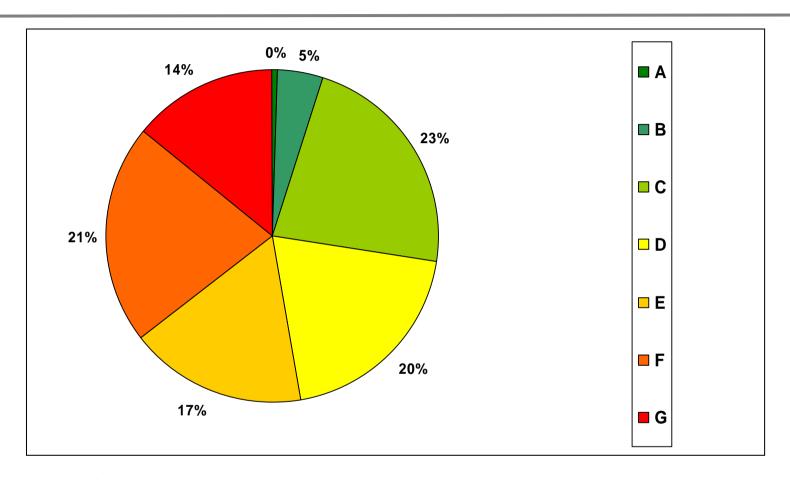
% of Press Spend by Publication – All Vehicle Segments Dominated by broadsheets and The Mail

% Press Spend



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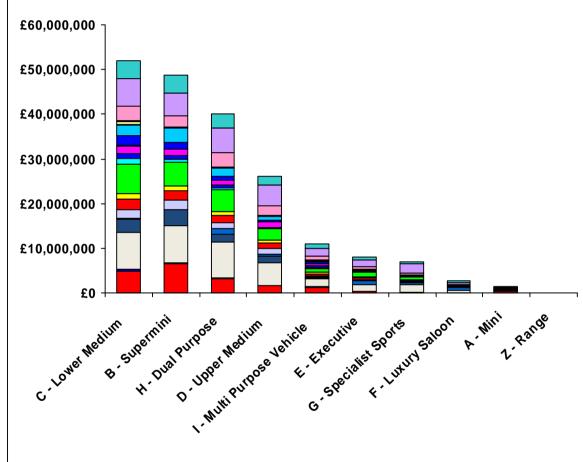
2007 National Press Spend by VED Band



VED Bands C, D and F all have at least 20% share of 2007 press spend. The lowest spend is within VED band A with only VW currently active towards the end of 2007.

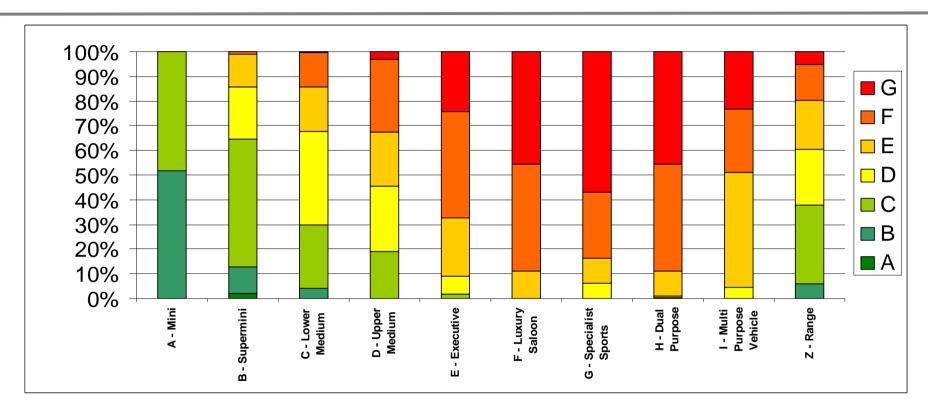
2007 National Newspaper Spend by Segment Almost as much spend on VED bands C & B, as all the others combined





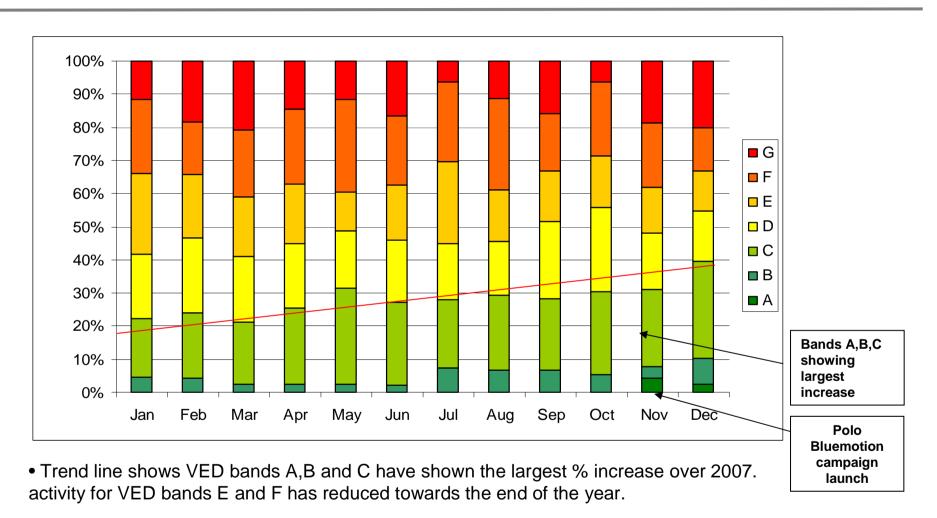


Vehicle Segment Spend by VED Band 2007



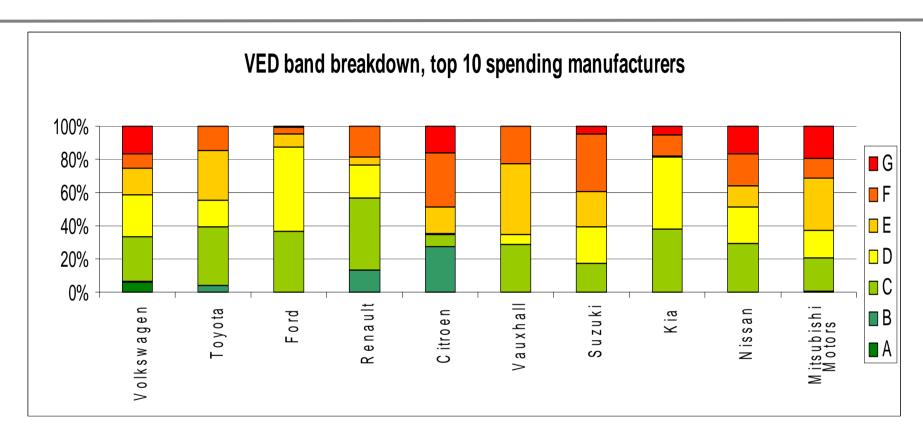
- Largest % spend for any band is for band C within B-Super-mini via Renault, Ford and Toyota
- B-Super-mini has the only recorded activity for VED band A (Polo Blue motion)
- As expected Vehicle segments F,G and I had the largest share of VED Bands E to G

% VED Band Press Spend across all Vehicle Segments 2007:



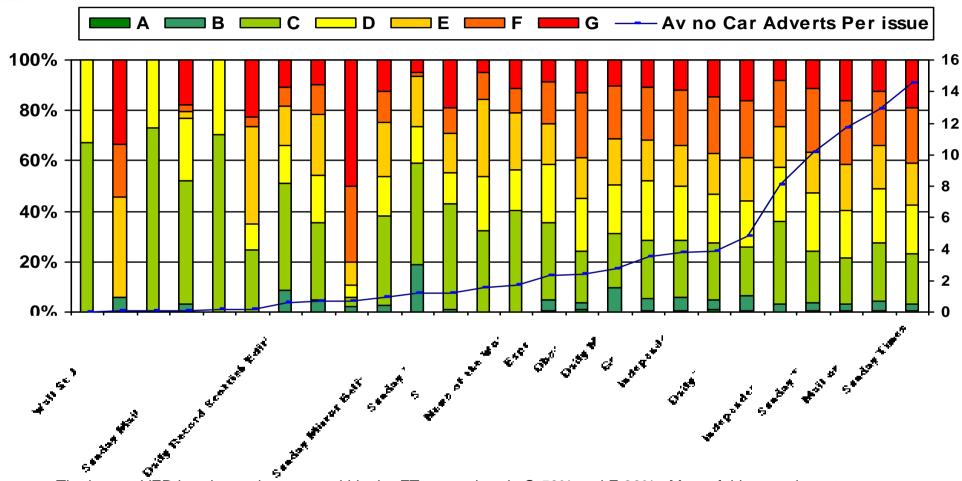
• Supermini segment is the only segment containing VED band A advertising and it also contains the largest % of VED band C

VED Band by top 10 Spending Manufacturers



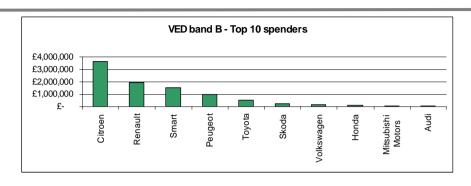
- Ford's Focus range is behind the largest spend within VED bands C/D
- Citroen operates at two extremes: it has the highest spend within F/G for the Xsara Picasso, as well as having the highest spend within VED band B for the C1

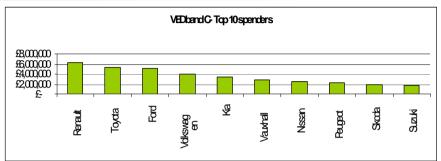
VED Band Newspaper SOV vs. Average number of cars advertised The FT has the highest spend in any VED band – these happen to be in Bands F & G

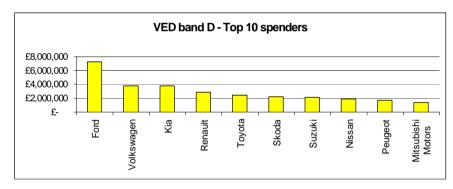


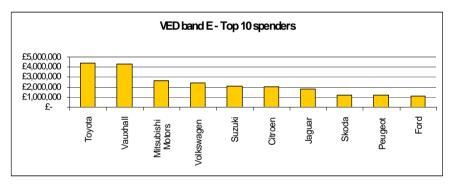
- The largest VED band spend appears within the FT across bands G-50% and F-30%. Most of this spend went towards the Land Rover Discovery and Lexus LS 460
- The Mail on Sunday and The Sunday Times have the highest number of cars advertised within each issue

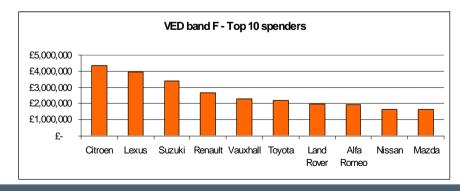
Top 10 Manufacturer Spend by VED band: Citroen appears as the top spender amongst both VED bands B & F

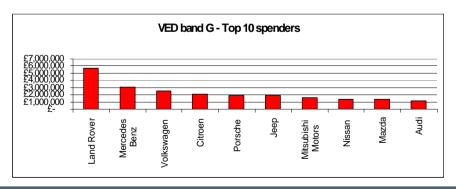




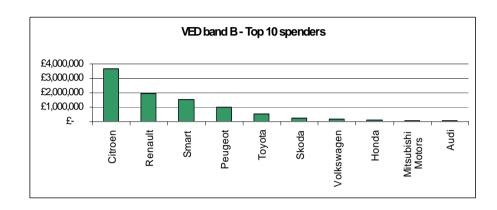




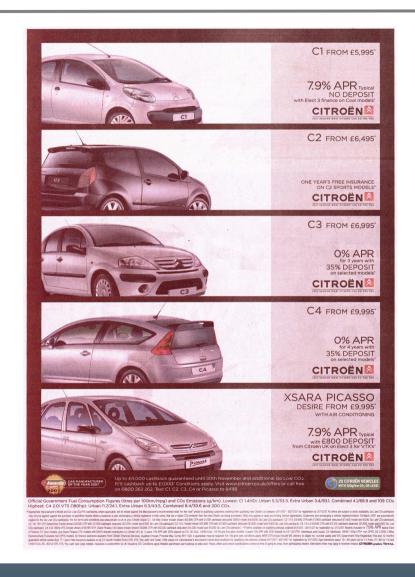




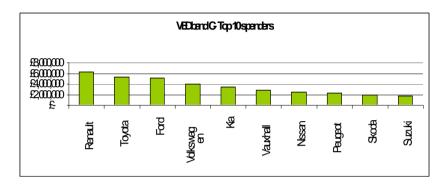
Citroens C1 outspends the market within VED band B



- Citroen spent £3.6m on Press advertising for Band B, on its C1 1.4 HDi. Key messages were:
 - -Value/Price
 - -Cashback and no deposit on select ranges
- Renaults activity within band B was predominantly for the Megane



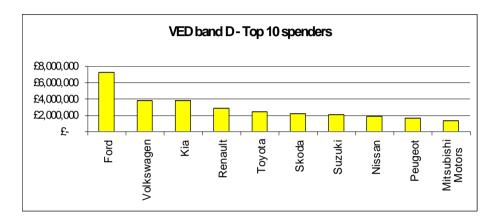
Renault just tops the spend within VED band C



- Renault spent £6.2m within band C across a number of models including the Megane, Twingo and Clio. Clio was the only model falling only into band C. Megane ranged from B to F due to the Megane Sport. The key message across the majority of Renault Clio ads. was:
 - Low Emissions, Value and fuel economy. Slogan "economical/ecological" is used across most campaigns within band C
- Toyota were a close second spending £5.2m on Yaris 1.3 VVT-I and the Auris



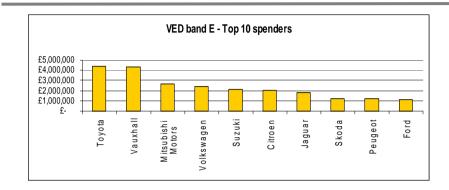
Ford outspends within VED band D by nearly 50%



- Ford spent £7.2m nearly double the amount on band D advertising compared with the rest of the market. The majority of spend went on the Focus Zetec Climate. Key message was Creature Comforts and Value/Price
- VW's activity for Band D included Polo, Fox, Jetta and Passat.



Toyota and Vauxhall share the spoils in VED band E

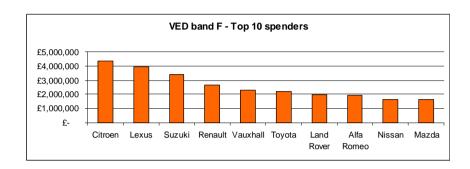


- Toyota and Vauxhall spent just over £4 million each within band E advertising. Toyota were promoting the Avensis 1.8 vvt-i and Yaris 1.8 dual vvt-i. All Vauxhall's activity went on the Zafira Energy 1.6i 16v
- Toyota have focused the key message on aspirational for the Yaris and creature comforts for the Avensis. The Vauxhall Zafira' key message is Value with its 0% APR over 4 years.





Citroens Xsara Picasso accounts for significant spend in VED band F

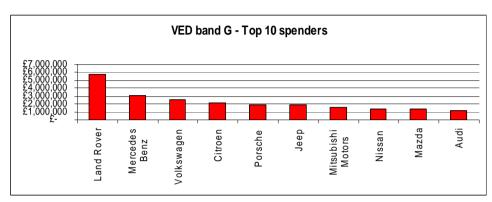


- Citroen spent £4.4m on band F related advertising covering the Xsara Picasso and the C4 VTS. Lexus came in 2nd with £3.9m focused predominantly on the RX 400h
- Citroen again focus the message on Value/Price across the range whereas Lexus focus on emissions in relation to the high performance of the RX 400h

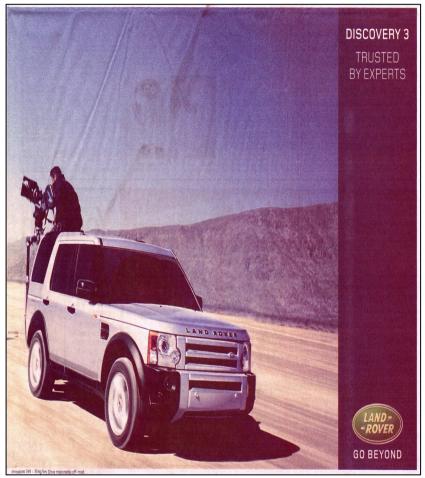




Land Rover spends almost double on VED band G for the Discovery model



- Land Rover spent £5.8m on advertising within band G. This covered the Range Rover Discovery and Discovery 3. The key message is one of reliability and safety across the Discovery range
- Mercedes Benz ranked 2nd with the primary activity across the CL and AMG range

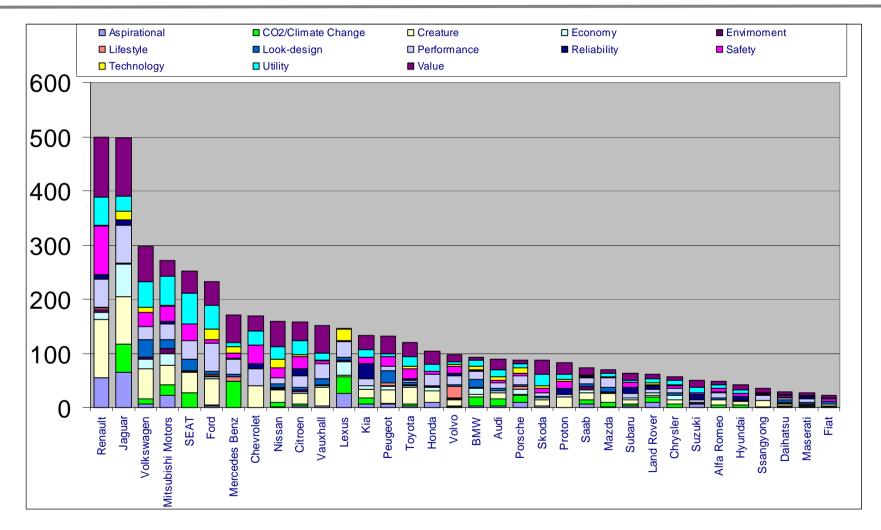


Keyword Ad count for National Newspapers 2007 – Value/Price comes top with 912 adverts containing the message

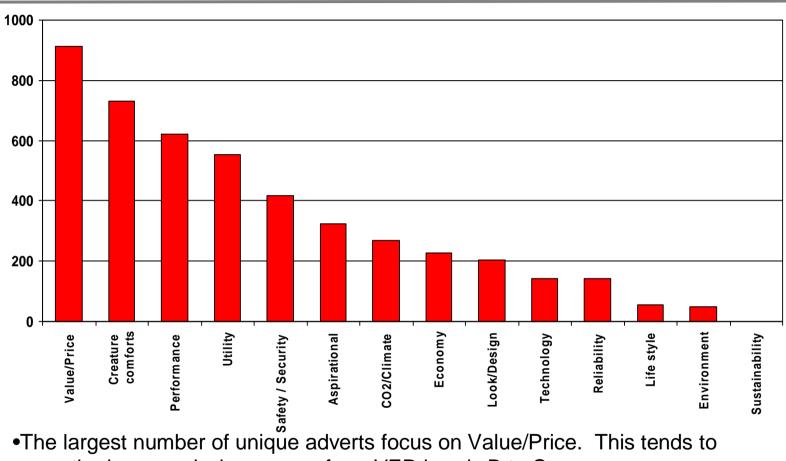
Key Word Search	Number of Adverts in 2007	Percentage of Total
Value/Price	912	20%
Creature comforts	732	16%
Performance	620	14%
Utility	552	12%
Safety / Security	418	9%
Aspirational	324	7%
CO ₂ /Climate Change	268	6%
Economy	228	5%
Look/Design	204	4%
Reliability	144	3%
Technology	144	3%
Lifestyle	55	1%
Environment	48	1%
Sustainability	0	0%
Total	4516	258%*
Total All Press	1,751	100%

^{*258%} relates to the number of ads that have been counted within more than one key word search.

Press Key Message count – of the key Manufacturers all have some CO₂ related message, except for Renault



Unique ads for keywords within National Newspapers –Value/Price & Creature Comforts rank highly, Environment & CO₂ get a fairly low count



- cover the lower emission ranges from VED bands B to C
- Creature comforts ranks number 2 with manufacturers focusing on a number of special features e.g. air conditioning

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Value/Price example*

THE PEUGEOT 107 FROM JUST £6,195* WITH CD PLAYER AND MP3 SOCKET. FOR MORE INFORMATION TEXT 'SPIN' TO 60222 OR CALL

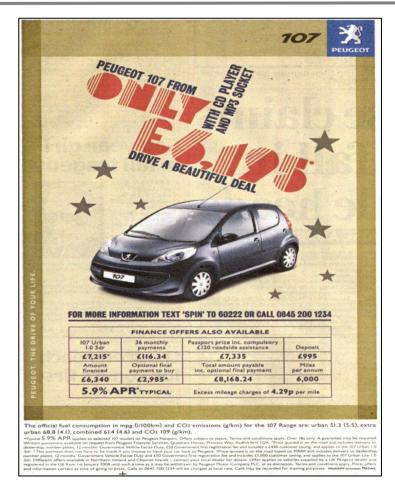
FINANCE OFFERS ALSO AVAILABLE 107 Urban 36 monthly passport price no. compulsory 1.0 3dr payments £120 roadside assistance

£7,215 £116.34 £7,335 Deposit £995

Amount Optional final Total amount payable Miles Financed payment to buy inc optional final payment per annum

£6,340 £2,985 £8,168.24 £6,000

5.9% APR TYPICAL



*Keywords used to generate report: Price" or "for just" or "easy payments" or "monthly payments" or "Per month" or "low insurance group" or "free" or "starting at" or "afford" or "cashback" or "moneyback" or "save" or "apr" or

"money off" or "offer" or "deposit"



Example of performance related messaging from SAAB*

The reason it's so powerful is the reason it's so economical.

With some thirty years of experience Twin Turbos are just the latest example of Saab's innovative approach.

They work together to produce the performance of a large petrol engine with the economy of a much smaller

diesel engine. Add to that dynamic new styling and you'll

be defying convention in more senses than one. For a

brochure call 0845 300 9395 or text Turbo to 84464 or visit www.saab.co.uk



Keywords used to generate report: (("Hot hatch" or exhilarating or sweetly or roadster or sport or power*) Or (Performance* w/10 (high or improved or increased or breathtaking or stunning or exhilarating or car or effortless or driving))Or (fun w/10 (driv*)))

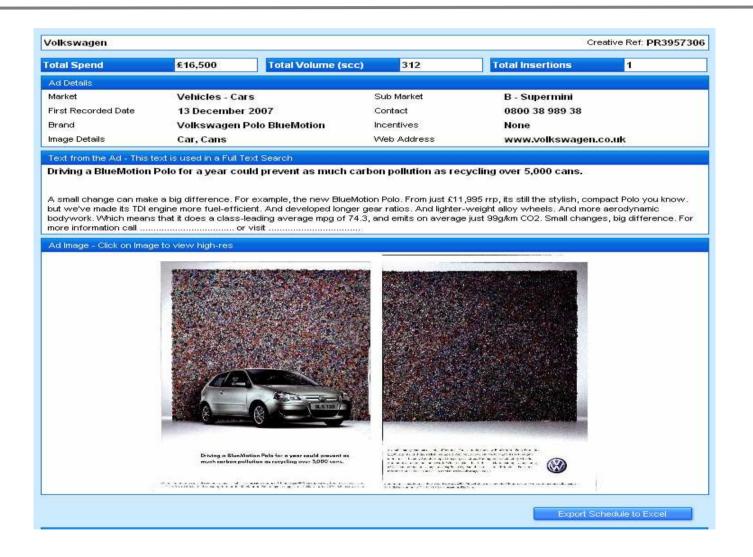
Skoda feature on Creature Comforts* "The New Skoda Fabia Estate. Full of lovely stuff".

The New Skoda Fabia Estate comes with extra helpings of boot for you to fit in even more lovely stuff. With free air conditioning on the Fabia land 0%Po APR* typical finance on the Fabia 2 & 3. All starting from a delectable £9,360 RRP. Skoda. Manufacturer of happy drivers.



*Keywords used to generate report: "Extras" or "CD" or "DVD" or "MP3" or "air conditioning" or "central locking" or "RDS" or "ABS" or "air bags" or "power steering" or "electric windows" or "remote locking" or "alloy" or "alloys"

Polo Bluemotion is the only model with an emission level registered VED Band A, advertised at the end of 2007



Conclusion:

- £113m was spent across all vehicle segments within National Newspaper Advertising in 2007
- The survey concluded that CO₂ and Climate Change was being used increasingly in car adverts but is still at a relatively low level.
- 6% of key messages within Press advertising relate to CO2/Climate change compared with 4% for TV adverts across all car manufacturers.
- There was a noticeable increase in Press advertising activity for the lower emission ranges across the Vehicle Excise Duty (VED) bands A/B/C towards the end of 2007.
- Value/Price and Lifestyle messages remain the focus for car manufacturers across both Press and TV advertising across 2007

billetts

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