DIGITAL
IQ
INDEX®

AUTO

February 10, 2016

SHIFTING GEARS

In 2015, a mix of low interest rates and declining fuel prices helped sell 17.5 million new cars in the United States, besting the previous record set in 2000.[1] In Europe, new car registrations have enjoyed 28 consecutive months of growth.[2] Amidst this positive environment, auto executives are unable to ignore the rumbling of technology giants who have taken a keen interest in the $1.6T business.[3] In a recent survey of 800 senior executives, two themes—digital connectivity and electric vehicle (EV) powertrains—toppled all competing trends in relative importance (after ranking ninth and tenth last year).[4]

This change in focus is no accident. Last year, Millennials drove 27 percent of new car sales in the United States, displacing Gen X as the second most influential group of buyers behind Boomers.[5] Among Millennials auto shoppers, 72 percent have considered a hybrid or electric vehicle, 62 percent would pay more for Internet-enabled vehicles, and 41 percent leverage mobile devices to inform purchase decisions (remotely and at the dealership).[6] While individual buyer considerations fluctuate by age group, the impact of digital remains fixed. Across all drivers, 75 percent suggest they would consider conducting the entire car-buying process online.[7]

M&A Aftermath

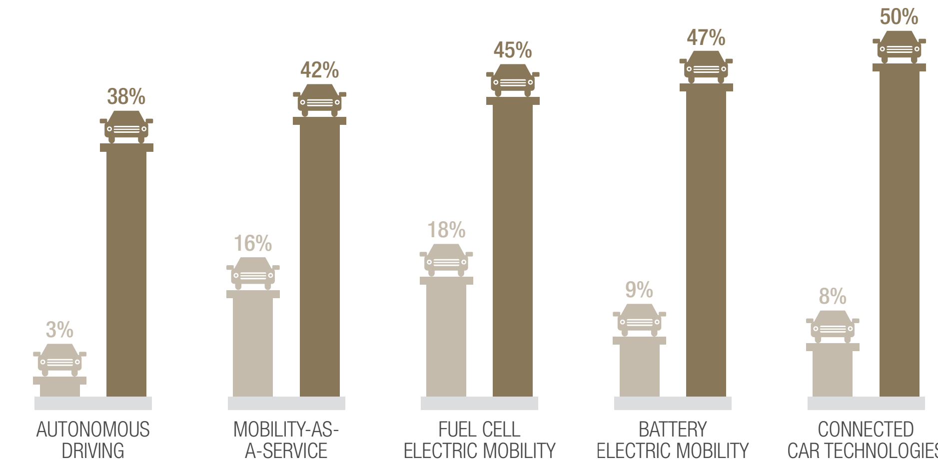
Despite the record year for the industry at large, there are distinct winners and losers. On average, automakers increased U.S. vehicle sales by six percent. Among the 37 auto manufacturers providing brand-level data, 40 percent met or exceeded this industry benchmark. Of those, three-quarters qualified as above “Average” in L2’s assessment of digital marketing capability. Less than a quarter of the 12 brands that registered a combination of high Digital IQ and elevated vehicle sales growth were affiliated with the Detroit “Big Three.”

1. “U.S. Car Sales Set Record in 2015,” Mike Spector & Jeff Bennett, The Wall Street Journal, January 5, 2016.
2. “Passenger car registrations: +9.3% in 2015; +16.6% in December,” European Automobile Manufacturers Association (ACEA), January 15, 2016.
3. “Apple’s Car Quest: Is Project Titan A Distraction or Manifest Destiny?” Steve Schaefer, Forbes, September 22, 2015.
4. “Global Automotive Executive Survey,” Dieter Becker, KPMG, January 2016.
5. “Millennials Embrace Cars, Defying Predictions of Sales Implosion,” Jing Cao, Bloomberg Business, April 20, 2015.
6. “Millennials Claim They’re Better Car Shoppers than Their Parents,” Edmunds, March 27, 2015.
7. “Car Buyers Want Better Digital Experience, Most Ready to Complete Entire Process Online,” Accenture, April 16, 2016.

Auto 2016: Key Business Disruptors Recognized by Industry Leadership

Percentage of Executives Rating Trend as “Extremely Important”

2015 vs. 2016, n=800 respondents from 38 countries ■ 2015 ■ 2016



Source: KPMG, January 2016.

Auto 2016: Comparative Digital IQ Performance Across Regions

Brand Headquarters vs. Target Market, Average Digital IQ (Percentile Rank)

February 2016 ■ Gifted ■ Average ■ Challenged

	USA Ranking, n=42	UK Ranking, n=45	DE Ranking, n=44
USA BRAND PERFORMANCE	118 (66%)	101 (46%)	105 (53%)
UK BRAND PERFORMANCE	82 (18%)	101 (44%)	91 (33%)
DE BRAND PERFORMANCE	112 (62%)	117 (67%)	128 (84%)

Source: L2, Inc., Digital IQ Index®: Auto 2016.

The fastest growing "Big Three" brand, Jeep—along with sister brands Dodge, Chrysler, and RAM—were bolstered by their affiliation with the Fiat Chrysler (FCA) portfolio. After the approval of the merger in August 2014, FCA consolidated dealer-facing digital media offerings, updated its legacy Uconnect® in-car technology, and completed a comprehensive digital agency review—demonstrating rare enterprise-level digital investments.[8,9] Brands that achieve strong offline performance despite weak Digital IQ include: brands engaged in a comprehensive product revival (Volvo), lower-volume offshoots of major brands (Acura), and brands undergoing "revitalization" efforts (Mitsubishi).[10]

German Craftsmanship

This year, L2 expanded its inquiry into the automotive sector to include digital marketing profiles specific to the UK and German markets. Despite the consolidated and global nature of the industry, brand performance varies significantly from geography to geography. Of the 34 brands operating across all three markets, country-level Digital IQ varied by an average of 20 points.

Brands headquartered in Germany are the only group to consistently escape this trend, classified as "Gifted" (in aggregate) both at home and abroad. Uneven performance by region resulted in only three brands (BMW, Toyota, and Volkswagen) securing a top 10 position in all geographies examined.

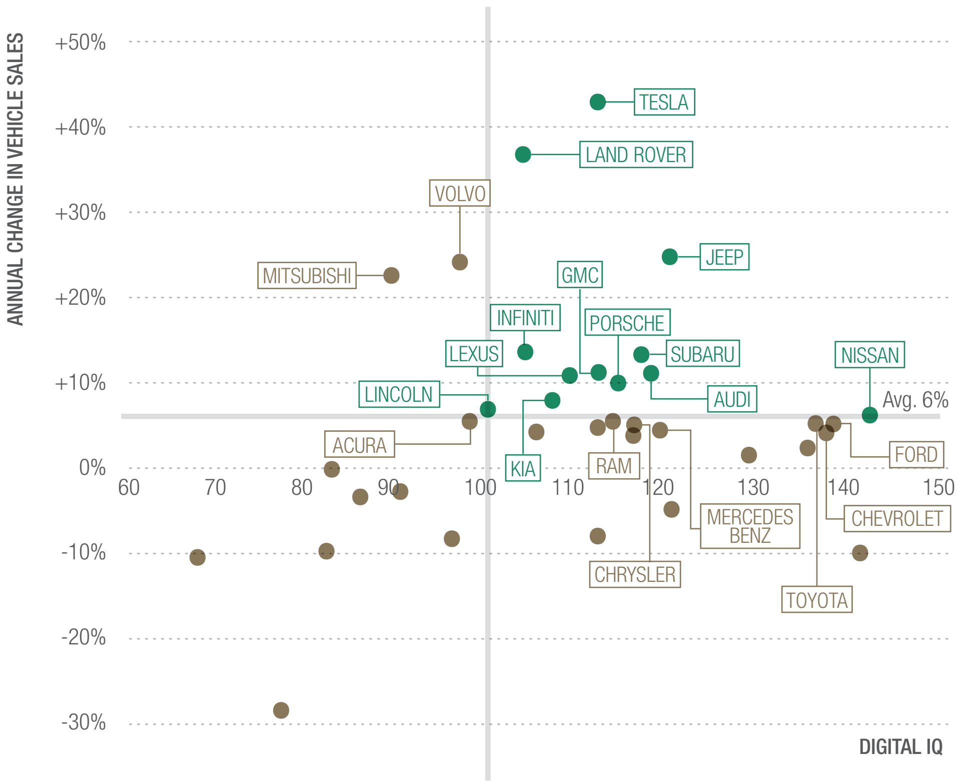
Digital IQ = Shareholder Value

Our thesis is that digital competence is inextricably linked to shareholder value. This study attempts to quantify the digital competence of 53 distinct Auto brands operating in the United States, United Kingdom, or Germany. Our aim is to provide a robust tool to diagnose digital strengths and weaknesses, helping managers achieve greater return on incremental investment. Like the medium we are assessing, our approach is dynamic. Please reach out with comments that help improve our methodology and key findings.

Regards, **L2**

Auto 2016: Digital IQ Score vs. FY15 Growth of U.S. Vehicle Sales

United States, n=37 Brands with Complete Data ■ High Growth / High Digital Investment



Source: L2 data and analysis of Auto News Data Center industry statistics, January 2015.

8. "CES 2016: Fiat Chrysler Debuts New Uconnect Features," Doug Newcomb, Forbes, January 4, 2016.
9. "Fiat Crysler Completes Its Digital Review, Names New Agency Lineup," Patrick Coffee, Agency Spy, October 19, 2015.
10. "Mitsubishi to Hit 100,000 Sales in 2016," Christie Schweinsberg, Wards Auto, January 8, 2016.

METHODOLOGY

DIGITAL MARKETING

35%

Brand Search:
Traffic & Web Authority, SEO/SEM

Category Search:
Visibility Across 400+ Category Keywords

Web Advertising:
Display & Video Impressions, Creative Units, Retargeting, Cross-Platform Initiatives

Email Marketing:
Ease of Signup, Frequency, Content, Triggered Emails, Segmentation, Personalization, Localization, Mobile Optimization

Earned Media:
Reddit Mentions, Visibility on Industry-Specific Blog Content (Car and Driver, Autoblog, Autonews, Motortrend)

SITE & E-COMMERCE

30%

Technology:
Load Time, Throughput, Analytics, Video Integration, Visitor Action Prompts

Search & Navigation:
Keyword Search, Filtering/Sorting Options

Model Pages:
Product Merchandising, Vehicle Comparison Engine, Handoff to Configurator and/or Dealership Locator, Financing Calculator

Car Configuration:
Dynamic Exhibits, Filtering/Sorting, Social Sharing, Handoff to Dealership Locator

Shopping Tools & Brand Building Content:
Certified Pre-Owned Locator, Brand Merchandise, Parts & Accessories, Owner Manual Downloads, Financing Tools

Dealership Locator & Customer Service:
Contact Options, Dealership Search, Geolocation, Directions, Local Dealership Inventory, Schedule Visit/Test Drive

MOBILE

25%

Mobile Site:
Compatibility, Load Time, Geolocation, Drive to Dealer, Mobile Feature Set

Tablet Experience:
Compatibility, Responsiveness, UI/UX Optimization for Touch Input

Mobile Search:
"Above-the-Fold" Brand Visibility, Passes "Mobile-Friendly" Test, Local Paid Ad Extensions

Mobile Advertising:
Impressions & Creative Units Registered on Mobile Devices

Mobile Apps:
Presence, App Store Performance (iOS & Android), Connected Car Functionality

SOCIAL MEDIA

10%

Facebook:
Reach, Engagement, Responsiveness, Support of Native Video Format, Call-to-Action Buttons

Instagram:
Reach, Engagement, Post Frequency, Video Content, #Brand Mentions

YouTube:
Brand Search Visibility, Viewership, Channel Experience, Performance & Optimization of Most Viewed Content

Twitter:
Reach, Engagement, Prgamming Tactics, Customer Service Support, #Campaign Mentions

Emerging Social Media:
Pinterest, Google+, Tumblr, Vine, Periscope, Snapchat, LinkedIn

CLASSIFICATION

GENIUS +140

Digital competence is a point of competitive differentiation for these brands. Creatively engineered messaging reaches consumers on a variety of devices and in many online environments.

GIFTED 110–139

Brands are experimenting and innovating across site, mobile, and social platforms. Digital presence is consistent with brand image and larger marketing efforts.

AVERAGE 90–109

Digital presence is functional yet predictable. Efforts are often siloed across platforms.

CHALLENGED 70–89

Limited or inconsistent adoption of mobile and social media platforms. Sites lackinspiration and utility.

FEEBLE >70

Investment does not match opportunity.

BRAND PERFORMANCE IN THE **USA**

Class	RANK	BRAND	Parent	DIGITAL IQ
GENIUS	1	Nissan	Nissan	142
GENIUS	2	Dodge	Fiat Chrysler	141
GIFTED	3	Chevrolet	General Motors	138
GIFTED	3	Ford	Ford	138
GIFTED	5	Toyota	Toyota	137
GIFTED	6	Honda	Honda	135
GIFTED	7	BMW	BMW	129
GIFTED	8	Jeep	Fiat Chrysler	120
GIFTED	8	Volkswagen	Volkswagen	120
GIFTED	10	Mercedes-Benz	Daimler	119
GIFTED	11	Audi	Volkswagen	118
GIFTED	12	Subaru	Fuji Heavy Industries	117
GIFTED	13	Cadillac	General Motors Company	116
GIFTED	13	Chrysler	Fiat Chrysler	116
GIFTED	13	Mazda	Mazda	116
GIFTED	16	Porsche	Volkswagen	114
GIFTED	16	Ram	Fiat Chrysler	114
GIFTED	18	Fiat	Fiat Chrysler	112

GENIUS
Nissan
Dodge

GIFTED
Chevrolet
Ford
Toyota
Honda
Bmw
Jeep
Volkswagen
Mercedes-Benz
Audi
Subaru
Cadillac
Chrysler
Mazda
Porsche
Ram
Fiat
Gmc
Hyundai
Tesla

AVERAGE
Lexus
Kia
Mini
Infiniti
Land Rover
Lincoln
Acura
Volvo
Jaguar
Buick

CHALLENGED
Mitsubishi
Scion
Ferrari
Lamborghini
Maserati
Aston Martin
smart
Alfa Romeo

FEEBLE
Bentley
Rolls-Royce
Bugatti

BRAND PERFORMANCE IN THE USA

CLASS	RANK	BRAND	DIGITAL IQ
GIFTED	18	GMC General Motors Company	112
GIFTED	18	HYUNDAI Hyundai	112
GIFTED	18	TESLA Tesla Motors	112
AVERAGE	22	LEXUS Toyota	109
AVERAGE	23	KIA Hyundai	107
AVERAGE	24	MINI BMW	105
AVERAGE	25	INFINITI Nissan	104
AVERAGE	25	LAND ROVER Jaguar Land Rover	104
AVERAGE	27	THE LINCOLN MOTOR COMPANY Ford	100
AVERAGE	28	ACURA Honda	98
AVERAGE	29	VOLVO Geely	97
AVERAGE	30	JAGUAR Jaguar Land Rover	96
AVERAGE	31	BUICK General Motors Company	90
CHALLENGED	32	MITSUBISHI MOTORS Mitsubishi	89
CHALLENGED	33	SCION Toyota	86
CHALLENGED	34	Ferrari Fiat Chrysler	83
CHALLENGED	35	LAMBORGHINI Volkswagen	82
CHALLENGED	35	MASERATI Fiat Chrylser	82
CHALLENGED	37	ASTON MARTIN Aston Martin Lagonda	81
CHALLENGED	38	smart Daimler	77
CHALLENGED	39	ALFA ROMEO Fiat Chrysler	72
FEEBLE	40	BENTLEY Volkswagen	68
FEEBLE	41	Rolls-Royce BMW	65
FEEBLE	42	BUGATTI Volkswagen	34

GENIUS
Nissan
Dodge

GIFTED
Chevrolet
Ford
Toyota
Honda
Bmw
Jeep
Volkswagen
Mercedes-Benz
Audi
Subaru
Cadillac
Chrysler
Mazda
Porsche
Ram
Fiat
Gmc
Hyundai
Tesla

AVERAGE
Lexus
Kia
Mini
Infiniti
Land Rover
Lincoln
Acura
Volvo
Jaguar
Buick

CHALLENGED
Mitsubishi
Scion
Ferrari
Lamborghini
Maserati
Aston Martin
smart
Alfa Romeo

FEEBLE
Bentley
Rolls-Royce
Bugatti

BRAND PERFORMANCE IN THE UK

	RANK	BRAND	DIGITAL IQ
GENIUS	1	Ford	146
GIFTED	2	Volkswagen	134
	3	General Motors	133
	4	Volkswagen	132
	5	Nissan	130
	6	BMW	129
	7	Honda	127
	8	Mazda	126
	8	Toyota	126
	10	Jaguar Land Rover	122
	10	Tesla Motors	122

BRAND PERFORMANCE IN THE UK

GIFTED

RANK	BRAND
12	CITROËN PSA Peugeot Citroën
12	HYUNDAI Hyundai
14	VOLVO Geely
15	LAND ROVER Jaguar Land Rover
15	PEUGEOT PSA Peugeot Citroën
17	Mercedes-Benz Daimler
18	RENAULT Renault
19	MINI BMW
19	PORSCHE Volkswagen

AVERAGE

RANK	BRAND
21	KIA Hyundai
22	FIAT Fiat Chrysler
23	LEXUS Toyota
24	ASTON MARTIN Aston Martin Lagonda
25	MITSUBISHI MOTORS Mitsubishi
26	Jeep Fiat Chrysler
27	SUZUKI Suzuki
28	CHEVROLET General Motors
29	BENTLEY Volkswagen

RANK	BRAND
30	Ferrari Fiat Chrysler
30	SUBARU Fuji Heavy Industries
32	LAMBORGHINI Volkswagen
32	SEAT Volkswagen
32	ŠKODA Volkswagen
35	ALFA ROMEO Fiat Chrysler
35	INFINITI Nissan
35	MASERATI Fiat Chrysler
35	McLaren McLaren

CHALLENGED

RANK	BRAND
39	smart Daimler
40	Cadillac General Motors
41	Rolls-Royce BMW

FEEBLE

RANK	BRAND
42	DACIA Renault
43	LOTUS Proton
44	CHRYSLER Fiat Chrysler
45	BUGATTI Volkswagen

BRAND PERFORMANCE IN DE

Class	Rank	Brand	Parent	Digital IQ
GENIUS	1	Volkswagen	Volkswagen	146
GENIUS	2	BMW	BMW	140
GIFTED	3	Audi	Volkswagen	137
GIFTED	4	Mercedes-Benz	Daimler	135
GIFTED	5	MINI	BMW	129
GIFTED	5	Ford	Ford	129
GIFTED	7	TOYOTA	Toyota	127
GIFTED	8	PORSCHE	Volkswagen	126
GIFTED	9	TESLA	Tesla Motors	123
GIFTED	10	CITROËN	PSA Peugeot Citroën	120
GIFTED	10	Opel	General Motors	120
GIFTED	10	PEUGEOT	PSA Peugeot Citroën	120

BRAND PERFORMANCE IN DE

	RANK	BRAND	
GIFTED	13	HONDA	Honda
	14	KIA	Hyundai
	15	SEAT	Volkswagen
	16	JAGUAR	Jaguar Land Rover
	16	VOLVO	Geely
	18	NISSAN	Nissan
AVERAGE	19	mazda	Mazda
	20	HYUNDAI	Hyundai
	21	RENAULT	Renault
	22	LAND ROVER	Jaguar Land Rover
	23	ASTON MARTIN	Aston Martin Lagonda
	24	Ferrari	Fiat Chrysler
	25	FIAT	Fiat Chrysler
	26	MASERATI	Fiat Chrysler
	26	ŠKODA	Volkswagen
	26	smart	Daimler
	29	CHEVROLET	General Motors
	30	ALFA ROMEO	Fiat Chrysler
	30	BENTLEY	Volkswagen
	32	LAMBORGHINI	Volkswagen
CHALLENGED	33	INFINITI	Nissan
	34	Jeep	Fiat Chrysler
	34	McLaren	McLaren
	36	SUZUKI	Suzuki
	37	LEXUS	Toyota
	38	Rolls-Royce	BMW
	39	MITSUBISHI MOTORS	Mitsubishi
	40	Cadillac	General Motors
	41	SUBARU	Fuji Heavy Industries
FEEBLE	42	DACIA	Renault
	43	LOTUS	Proton
	44	BUGATTI	Volkswagen

Dis-Economies of Scale (And the Regional Consequences)

Site templates employed across regions in the automotive sector are more representative of the teams that manage regional businesses than of overall brand strategy or differences in regional consumer behavior. The majority of brands observed—57 percent—operate separate site templates for North America and Europe, while one-quarter operate three separate templates for the markets observed, one each for the U.S., UK, and Germany. Just under one-fifth operate one global site, all belonging to super-premium brands with small budgets and minimal site investments overall.

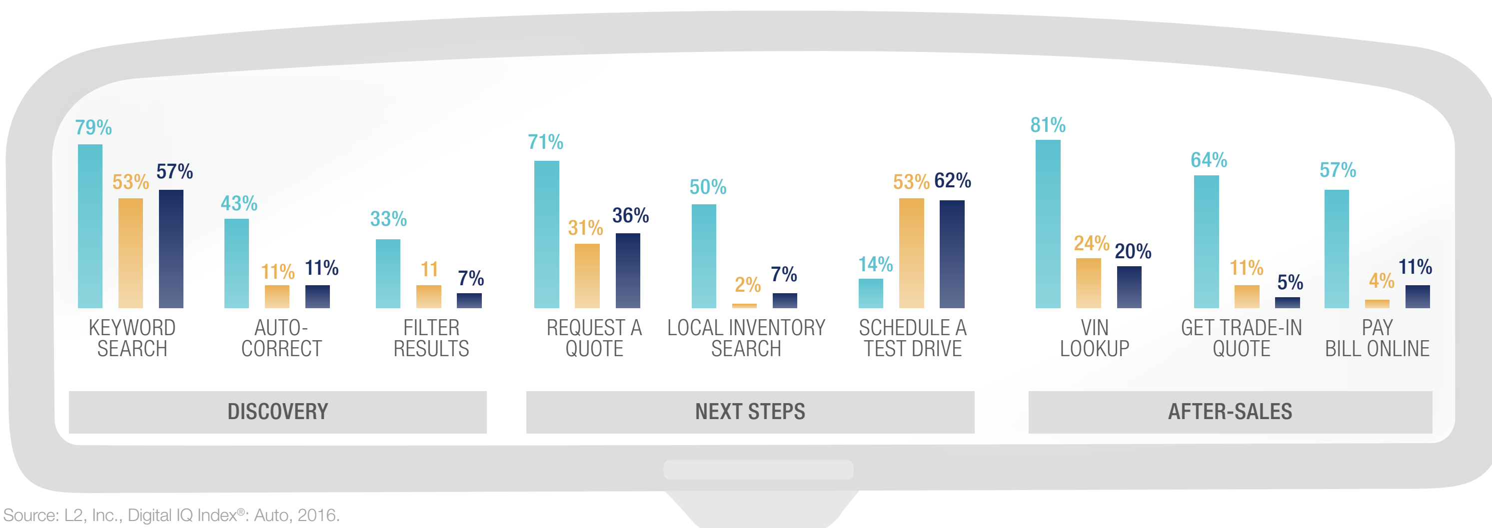
The consequences of regional siloes are clear. In most cases, best practices observed on sites in the U.S. are not shared with teams in Europe, and the availability and sophistication of features on brand sites differ substantially between regions. From a product discovery standpoint, site search sophistication differs dramatically across regions. Twenty-six percent fewer brands offer site search as a feature in the UK than in the U.S., with 22 percent fewer in Germany. Seventy-five percent fewer brands offer auto-correct on search results in European sites, while a third as many offer the ability to filter search results.

Within the dealership handoff, the main next step from U.S. sites is almost completely lacking from European sites: the ability to search local dealerships' inventory. Three-quarters of U.S. OEMs offer a way to search new vehicle models available nearby, while seven percent of German sites and a measly two percent of British sites offer the same feature.

After-sales support features in European markets suffer the most when switching between regions. Four-fifths of U.S. sites offer clear information on recalls, while one-quarter and one-fifth do in the UK and Germany respectively. Equally stark differences emerge in the ability to apply for financing, pay a bill online, and the ability to get a trade-in quote.

Auto 2016: Sophistication of Site Features Across Regions

September 2015 USA, n=42 UK, n=45 DE, n=44



Source: L2, Inc., Digital IQ Index®: Auto, 2016.

Volkswagen operates three significantly different site templates between the three regions examined.

Email: Underutilized

Auto dealerships are proficient email marketers, with email accounting for 39 percent of U.S. dealership leads because of its effectiveness and low cost.[11] However, OEMs fall significantly behind their dealership networks in email marketing sophistication.

Within the U.S., most brands are collecting data during newsletter sign-up to segment subsequent email messaging. Two-thirds of brands ask for a model of interest and a ZIP code during sign-up, while one third ask for an estimate of when the user is planning on buying a new car (e.g., 2-3 months). Outside of the U.S., less than one-fifth of brands are collecting any of these data points.

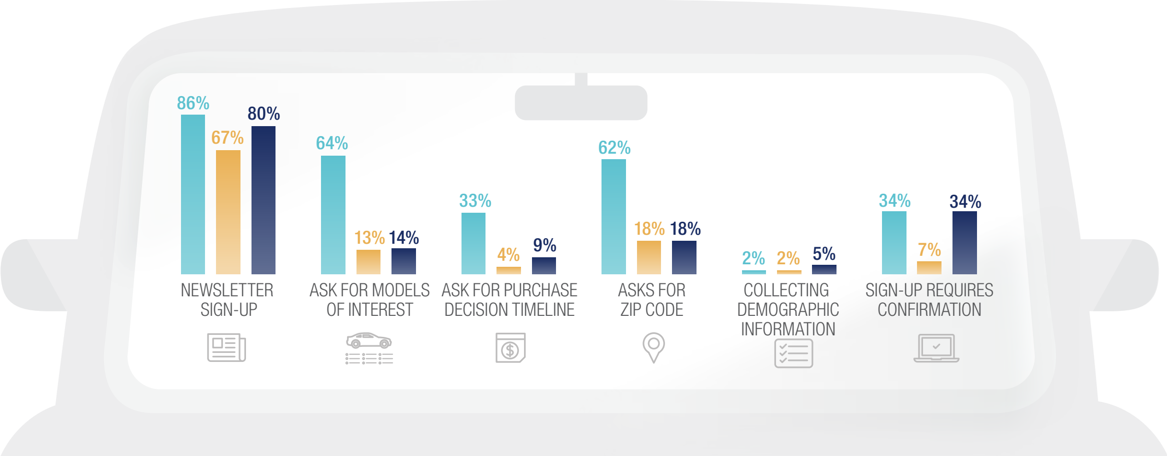
Fewer brands successfully take the information they collected to tailor emails based on the data collected to help facilitate a purchase. Of the U.S. emails received, 47 percent pushed consumers laterally across channels (lifestyle content, order a brochure, etc.), 16 percent encouraged users to find a nearby dealership, 13 percent drove to a configuration engine, and less than 10 percent included special offers, encouraged users to schedule a test drive, or promoted a local event.

Email frequency from Auto brands is low, with the average OEM sending 0.6 emails per week, or two emails per month, however brands have been significantly investing in the platform since 2014, with frequency up 50 percent. EU email implementation lags significantly behind the U.S., with brands sending an average of 0.2 emails per week in the UK and 0.1 emails per week in Germany. In all markets, brands have significant opportunity to grow email as a channel—the discrepancy between average email frequency and top performers is large, as Nissan sends nearly four emails per week, 6.5x the average.

Auto 2016: Information Collected During Brand Newsletter Sign-Up

Percent of Brands Soliciting Data Field

August 2015 USA, n=42 UK, n=45 DE, n=44

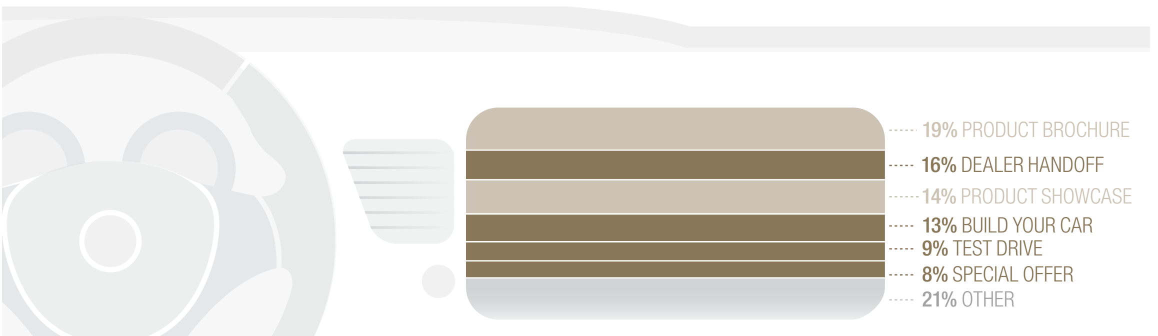


Source: L2, Inc., Digital IQ Index®: Auto 2016.

Auto 2016: Content Categorization of Email Marketing

August–September 2015, n=68 Emails from U.S. Brands

Push Consumers Laterally Across Channels Push Consumers Further Down the Purchase Funnel



Source: L2, Inc., Digital IQ Index®: Auto 2016.

11. "For dealers, email still king for nabbing sales leads," David Barkholz, Automotive News, August 10, 2015.

Facebook: Pedaling Backwards

Over the past year, Facebook's News Feed algorithm has systematically deprioritized sponsored brand content in favor of content posted by friends, cementing the platform's "pay to play" pivot and zeroing out brands' organic reach.[12] Across most industries, L2 has seen post frequency fall as brands have put more media dollars behind fewer posts in order to keep up engagement.

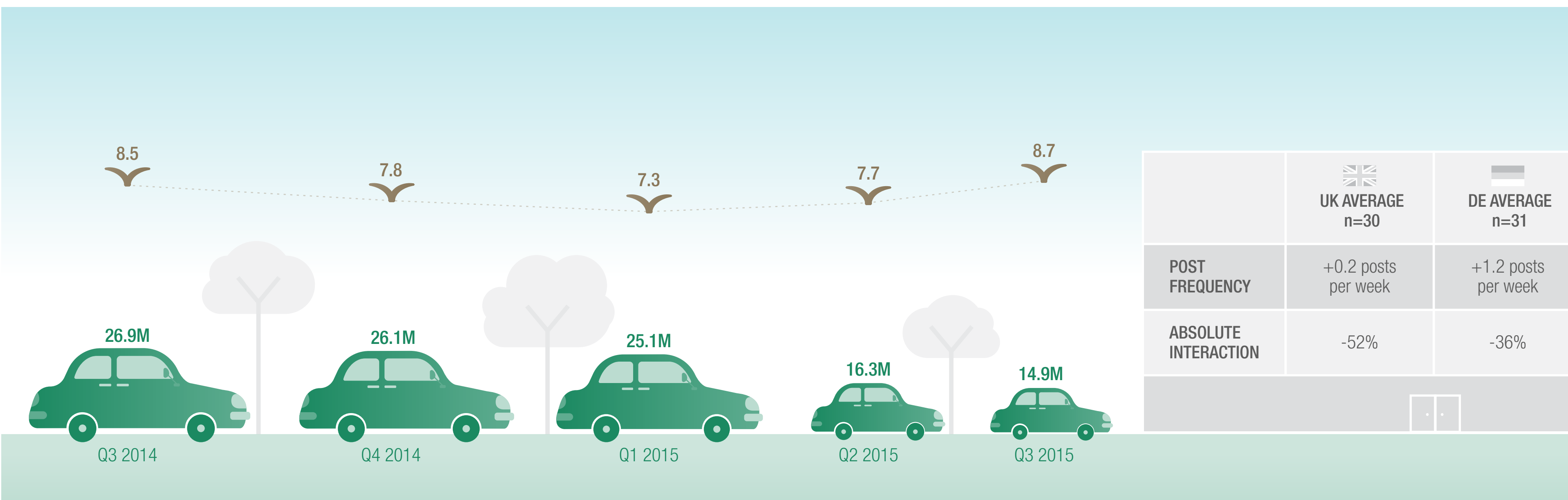
12. "Facebook Changes News Feed Algorithm to Prioritize Content from Friends Over Pages," Amit Chowdhry, Forbes, April 23, 2015.

Interaction with Auto brand content fell slightly from Q3 2014 to Q1 2015, and then fell off a cliff in Q2 2015. Year over year metrics from Q3 2014 to Q3 2015 show a decrease in post interaction of 45 percent. Instead of adapting to the new "pay to play" environment on Facebook by decreasing post frequency in favor of fewer posts with higher media spend, effectively using the channel as a broadcast medium, Auto brands have actually increased posting year over year by 0.2 posts per week. Reactions have followed the same pattern in the UK and Germany, with interaction down 52 percent and 36 percent respectively.

Auto 2016: Total Post Engagement on Facebook, by Quarter

Q3 2014–Q3 2015, n=30 U.S. Facebook brand accounts

Absolute Interactions ■ Posts Per Week



	UK AVERAGE n=30	DE AVERAGE n=31
POST FREQUENCY	+0.2 posts per week	+1.2 posts per week
ABSOLUTE INTERACTION	-52%	-36%

Source: L2, Inc., Digital IQ Index®: Auto 2016.

Mobile Sites: Europe Lagging

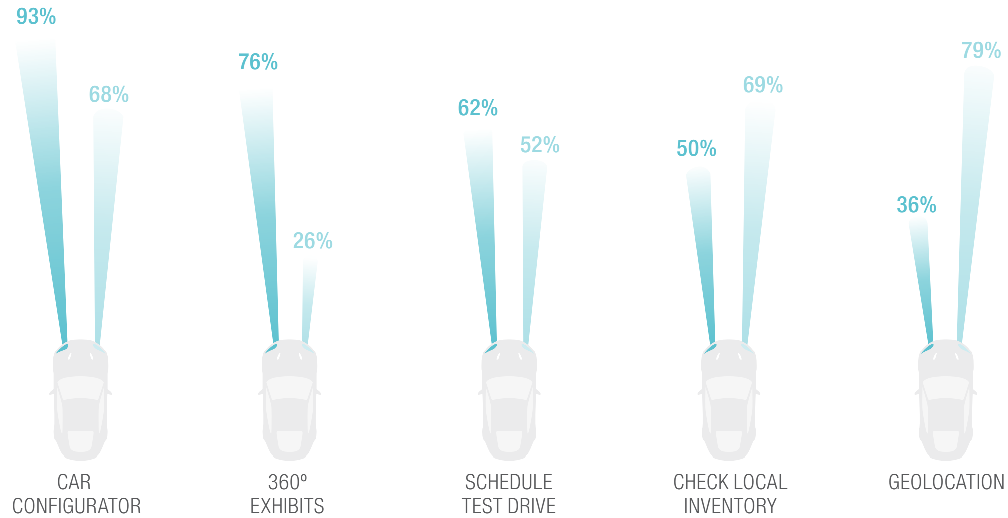
Two-thirds of Auto purchasers report mobile research as being an important influencing factor in their purchase decision. Only one brand in the U.S., Bugatti, lacks a mobile optimized site experience, while only a handful lacked mobile optimization in the UK and Germany. But the quality of mobile-optimized experiences, and the ability to conduct mobile research, varies widely across regions and devices.

The number of mobile sites with 360˚ exhibits halves when switching from desktop to mobile, while a 27 percent gap exists between desktop car configurators and mobile-optimized ones. Only one feature, Geolocation, a more natively mobile way to serve local content, is significantly more prevalent on mobile sites than on desktop sites.

Looking across regions, the industry-wide view of mobile optimization is less rosy. While mobile site optimization is nearly at parity with the U.S. in the UK and Germany, the sophistication of features on those sites is comparatively much lower. While 71 percent of U.S. mobile sites offer a window into local dealership inventory, 15 percent of British and just eight percent of German mobile sites offer the same feature. A similar drop-off rate exists with mobile financing calculators. Half the number of German and British sites offer mobile-optimized car configurators when compared to U.S. mobile sites.

Auto 2016: Availability of Site Features on U.S. Desktop vs. Mobile Sites

September 2015, n=42 Desktop Mobile

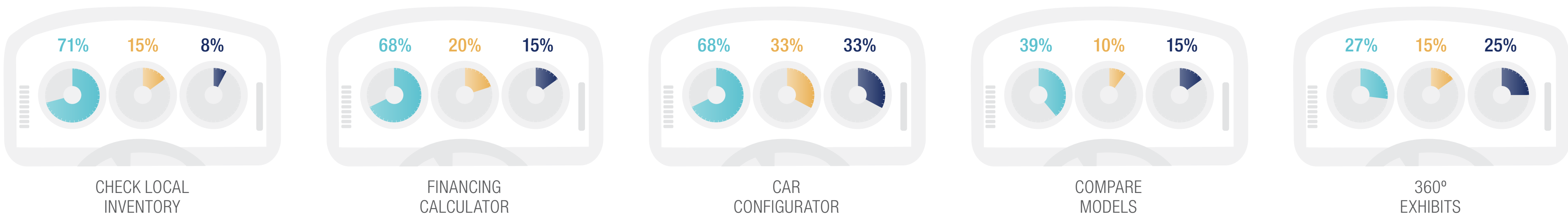


Source: L2, Inc., Digital IQ Index®: Auto, 2016.

Auto 2016: Mobile Site Functionality Across Regions

Percentage of Brands Employing Feature

September 2015 USA, n=41 UK, n=40 DE, n=40



Source: L2, Inc., Digital IQ Index®: Auto, 2016.

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L2 BENCHMARKS DIGITAL PERFORMANCE

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100 REPORTS PUBLISHED ANNUALLY

60 EVENTS GLOBALLY IN 2015

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For brands looking to benchmark their digital strengths and weaknesses relative to sector peers.

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- ON-SITE VISIBILITY
- SEARCH RANK
- CATEGORY MERCHANDISING
- PRICING & ASSORTMENT
- PRODUCT MERCHANDISING

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- OMNICHANNEL RETAIL
- SOCIAL CONTENT & STRATEGY
- LOCALIZATION
- THE DIGITAL ORGANIZATION
- VIDEO
- DATA & TARGETING

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