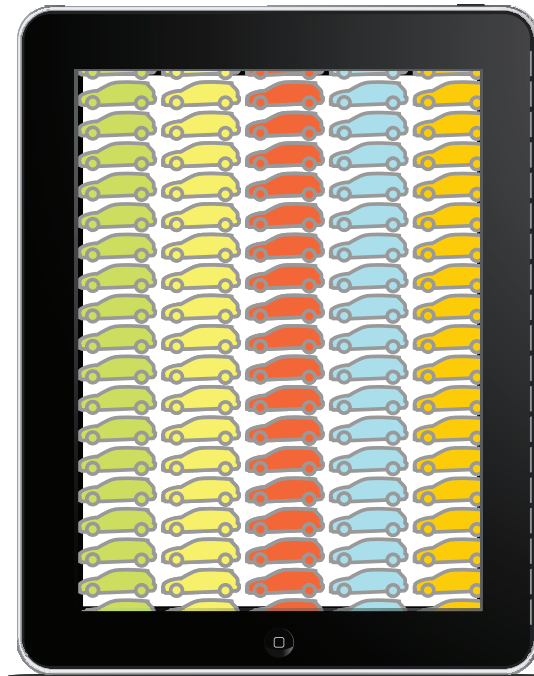


CAR
BRANDS
online:
2012
in review



sophus3

CAR BRANDS online: 2012 in review

edited by Paul Rutishauser

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Introduction

Sophus3, the authors of this report, assist car brands to maximise their online presence and marketing effectiveness. We are uniquely placed as an 'advertisement independent' service to understand the complete online audience to car brand sites, its behaviour and how that is evolving.

The eDataXchange (eDX) initiative, that we host, is a collaborative project between car brands in Europe enabling them to share and benchmark the performance of their websites with each other.

This review is based on analysis and insights drawn from the data we collect through that project. In the case of the 'Big 5' Markets included here – Germany, the UK, France, Italy and Spain – we tracked traffic across 83 separate car brand sites and monitored more than 450 million individual visits during 2012.

The data that we share in the 'Numbers' section of this review therefore can give some fascinating, 'high altitude' understanding of where visitors come from, what they are interested in, and what they do whilst on car brand sites. (Of course, the participants

in the eDX project have access to far more detailed information which they use on a continuous basis to understand the behaviour of their audience more precisely, so as to be able to realise the value of all of their marketing and digital assets.)

In the 'Trends' section we look at some of the themes to emerge over the last year in relation to car brand web sites and suggest what may concern digital managers in the automotive industry over the coming months.

If you would like to know more about sophus3, our web analytics and management information services, or the eDataXchange project and our work with the automotive industry, then please visit www.sophus3.com.

We hope you find this review stimulating, if you have any questions or feedback then please email sophus3 at: contact.en@sophus3.com.

Marcus Hodgkinson

CEO, sophus3 Ltd.

London, February 2013

Key findings

Numbers

1. Despite the downturn in the European car market, the number of visits to car brand sites increased in 2012, although less markedly than previously.
2. The online audience continues to show a disproportionate interest in premium brands relative to their market share.
3. Interest at model level showed spikes of online interest generated by advertising activity, but there are only a small number of vehicles that appear permanently installed in the on-line consumers' consideration set.
4. The web audience on car sites is most active in the evening. Sunday is becoming a significant day when much time is spent on sites. There are clear implications for customer-facing operations if most online interest is outside 'office hours'.
5. Search engines are the primary source of traffic to car sites (42%); paid search accounts for a fifth of that traffic.
6. Social media is insignificant as a direct driver of traffic to brand websites confirming that social media strategy needs to be distinct from web strategy in both its execution and measurement

Trends

1. Car brands are continuing to make efforts to maximise the effectiveness of their websites. Use of behavioural targeting has increased during the year although only a minority of brands in Europe embrace it. We expect interest in this technology to grow as the 'need for leads' increases.
2. Car brands' response times to online enquiries, as measured by a dedicated study undertaken by sophus3, have improved. There are still huge variations between markets and brands, with instances of brands failing to even answer some on-line test drive requests. The 'best practice' brands, and the reactivity of dealers in the US, suggest that there is much room for improvement.
3. Access to car brand websites via mobile and tablets has increased significantly in the last 12 months. We expect nearly a quarter of visitors to be viewing car brand content through 'non-standard' devices by the end of 2013 or soon after. This provides both threats and opportunities.
4. The web browsers used by visitors is moving towards a four way split with the ascendancy of Microsoft's Internet Explorer at an end. How these different browsers deal with different content (particularly animated content) and 'cookies' will provide web site managers with yet more headaches during 2013.

Section 1: Numbers

Growth in traffic to car brand sites

Across the 'Big 5' European markets (Germany, UK, France, Italy, Spain) the number of visits to car brand websites grew by 6.3% compared to 2011. In comparison to the growth in visits recorded in previous years across the sites we monitor, this was relatively subdued.

The year-on-year growth in car website traffic across the Big 5 markets over the life of the eDataXchange project does mirror the ups and downs of the car market to a very large extent. (The graph below shows the increase/decrease in the number of visits made to the sites we monitor in the 'Big 5' over the last seven

years.) We see healthy growth from the beginning of the decade rapidly subdued by the onset of recession in 2007. In 2009 concerted efforts to help the car market with government scrappage schemes saw a massive influx of traffic to car brand sites and a short-term increase in registrations. The post scrappage 'hangover' was evident throughout 2010. The return to growth in online interest in 2011 gave hope of a broader return to 'normality'. So does the flattening of audience growth during 2012 confirm the view that Western Europe is sliding into another economic trough?

Possibly, but we should be wary of drawing too

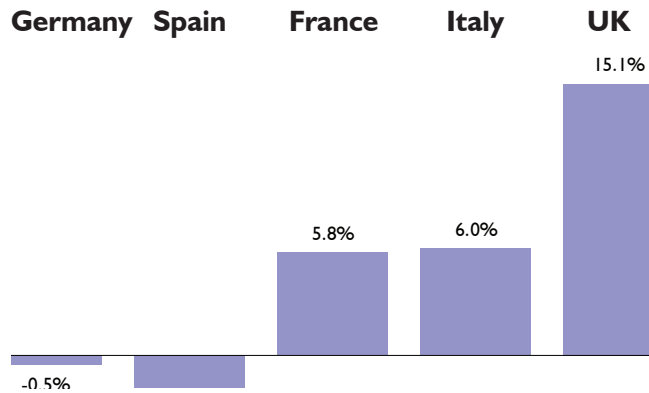
Annual increases in visits to car brand sites 2005-2012



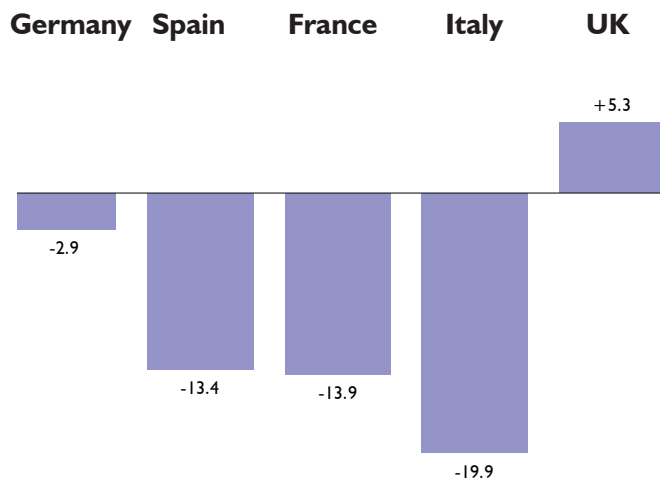
direct a causality between the depressed nature of the European car market and the slowdown in growth of the number of visits made to manufacturer websites. The growth which started in the first half of the last decade, and which straddled the first recessionary slump, was partially fuelled by the growing ubiquity of web access and domestic broadband. (During that timespan we saw a shift in the time of day visitors came to auto sites – moving from the morning to the evenings, suggesting more ‘surfing from home’ activity.) The slowing of growth evident in the last year may therefore reflect a more general levelling off in Internet use as a saturation point in domestic broadband penetration is reached.

It should be noted though, that the performance in individual countries correlates with the health, or otherwise, of the local vehicle market. With, for example, site traffic in Spain, the weakest car market in the group over the medium term, falling most, whilst visits to UK sites showed the most growth as the car market there continued to strengthen. But generally, apart from Germany, online growth continues to outstrip ‘offline’ with Italy showing the biggest spread between a plummeting car market, and continuing growth in visits to car brand sites.

Changes in visits to brand sites 2012 ‘Big 5’ Markets



Changes to car market 2012 ‘Big 5’ Markets



Car brands they were interested in

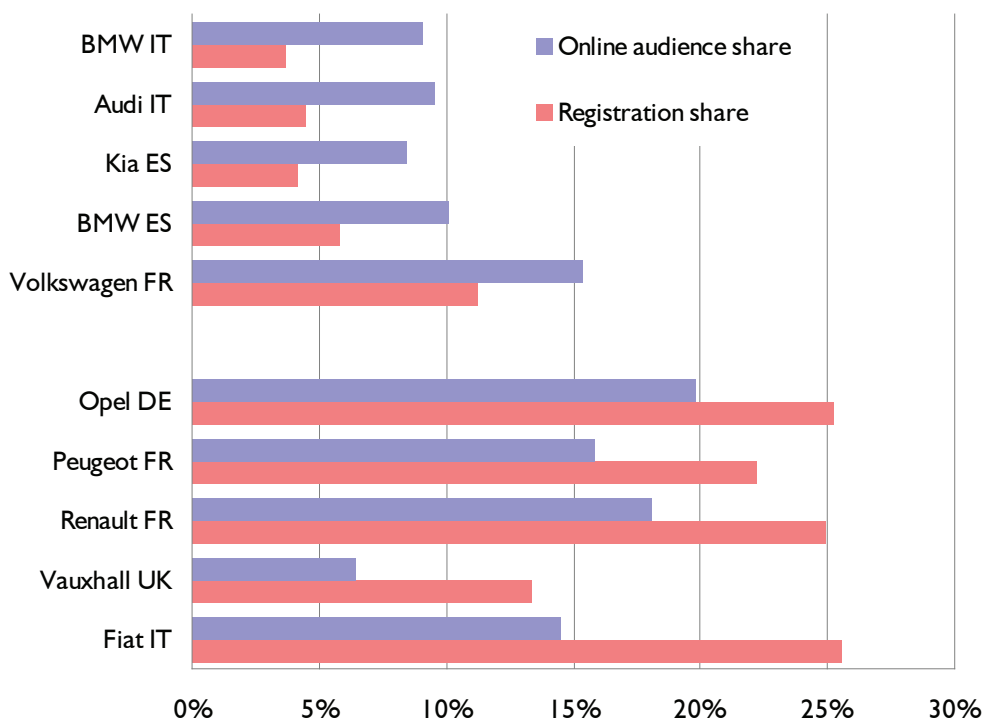
The comparison of traffic between the individual brand sites in 2012 shows some familiar patterns as well as some nuances that reflect the brand's different fortunes during what has been another difficult year for the car industry.

The premium brands continue to 'punch above their weight', attracting a share of the online audience larger than their share of the vehicle market.

Audi and BMW regularly achieve twice the share of the monthly online audience to eDX car brand sites, compared to their actual share of sales volumes in the markets where we track them. In the graph, we can see that in Italy, for example, over the whole of 2012, both brands each attracted more than 9% of the visits made to all participating sites, although their sales volumes were both around 4% of the same brands' total. (It is positive performance by Kia in Spain achieving a similar ratio in these performance metrics: its hope would be that the future level of sales will catch up with the relative high level of online interest it has generated.)

At the other end of the scale are brands with higher sales volume and 'real' market share but which struggle to match this reach online. Fiat, the market leader in Italy, accounting for 26% of all vehicles sold by the brands we track, received only 14% of the combined visits made to all their websites. Manufacturers seem particularly vulnerable to this inverse of online interest versus sales in what is perceived to be their 'home' market.

Examples of car brands online share versus share of registrations



But the reasons for specific success over the shorter term are hard to predict. The brands from the eDX group showing the largest year-on-year percentage gains in audience were Škoda, Seat, Peugeot, Mini, and Volkswagen. Undoubtedly much of this is to do with both their product cycles and

marketing. Škoda from this group introduced models into two market segments where it was not previously present (Citigo and Rapid), whilst interest in Peugeot arose from the launch of new 208 and the huge pan-European campaign that accompanied it.

Segments of interest

The segment of the vehicle market showing the most growth in visitor interest during 2012 was the small/mini car or 'A' Segment. Across the five markets the number of visits to this type of vehicle model rose +15%.

The launch of Volkswagen Up! at the turn of the year (followed by its appearance in re-badged form as Škoda Citigo and Seat Mii) caused much of this interest. However, Fiat's heavy promotion of Panda in its home market, at the beginning of 2012 and the sustained support for its 500 model, also created growth in traffic monitored for this segment.

Interest in 'Superminis' – B segment cars such as the Ford Fiesta and Renault Clio – also grew slightly, these receive the greatest bulk of visits across all markets, reflecting as you would expect, consumers' current preferences.

Larger siblings – C segment vehicles such as Ford Focus, Renault Megane, Volkswagen Golf are the second most visited group.

Volkswagen up!



Model interest

Within the set of models we track, the market leaders with long term and consistent sales, invariably dominate online traffic as well. Ford Fiesta was in the list of top ten most visited models in all five markets for 2012, so too was Golf in the markets where we track Volkswagen. Ford Focus, Renault Clio, Toyota Yaris, Audi A3 are also consistently highly placed in each month's rankings.

But variations between markets remain, with national preferences and loyalties evident, for example, in the high rankings achieved by Seat models in Spain.

New models create spikes of interest around the point of launch, with visitor numbers following the shape and reflecting the size of the accompanying marketing campaign.

New model introductions during 2012 that successfully produced these surges of on-line interest are shown in the accompanying table, with the number of individual visits made to the online model page during the month indicated.

Such spikes, however, can be short lived: sustaining interest beyond a novel or innovative campaign is the challenge for marketers. Using on-line interest as a measure of campaign success needs to consider more than just the volume of traffic immediately generated. The quality of traffic, in terms of audience engagement and longevity, are truer measures of campaign success.

Spikes of Traffic to model pages 2012

Period	Model	Visits
Jan	Volkswagen Up! France	██████████
Mar	Peugeot 3008 Spain	██████████
Mar	Volkswagen Up! UK	██████████
Apr	Peugeot 208 France	██████████
Apr	Citroën DS5 UK	██████████
May	Citroën C4 Aircross Italy	██████████
Oct	Ford B-Max Spain	██████████
Nov	Volkswagen Golf Italy	██████████
Dec	Ford B-Max Germany	██████████
Dec	Seat Leon Germany	██████████

On-line audience vehicle segmentation

One of the most revealing things we learn about the audience for cars online from our data is how they group and compare vehicles. Whilst the car industry still follows a quite rigid segmentation in thinking about its products, based around external dimensions and characteristics, the consumer appears oblivious to these considerations,

Model consideration tracking is the technique we use to learn which cars from all the different manufacturers an individual web visitor has looked at. To do this we do not tag users through cookies, but instead identify and track a 'digital fingerprint' of an individual device which we can subsequently analyse as present across different sites and model pages.

From this information we can create a 'consideration set' for any model, which shows in descending order the percentage of shared audience with other vehicle models. What is interesting about this data is that it is based on the behaviour of real people in real time, making choices about the cars they want to look at. What is immediately evident is that people do not confine themselves to a narrow review of similar cars.

The 'Example Online Model Consideration Set' shows what other cars the audience for Opel Corsa in Italy looked at in the final quarter of last year. (The percentages show the audience for Corsa shared with each of the other cars). Ford Fiesta, Fiat Punto and Renault Clio, would be viewed as the 'natural' same segment competitors – however Fiat Panda is a smaller car that the industry places in a different segment, yet

in its combined guises, it is the second most commonly viewed model considered alongside Corsa by the online audience.

Example Online Model Consideration Set

Opel Corsa | Italy 2012 Q4

the other cars online visitors to this model page also most commonly looked at

1	Ford Fiesta	22%
2	Fiat Panda	12%
3	Fiat Punto	12%
4	Renault Clio	8%
5	Fiat Panda Classic	6%

On occasion the consideration set of cars actually viewed by website visitor will bear no relation to the manufacturer's view of who it thinks it is competing against.

A second example for a premium vehicle in the same market and during the same period illustrates this:

Example Online Model Consideration Set

BMW Series 3 Saloon | Italy 2012 Q4

the other cars online visitors to this model page also most commonly looked at

1	Volkswagen Golf
2	Mercedes-Benz A-Class
3	Audi A3
4	Alfa Giulietta
5	Fiat Freemont

From an industry point of view, all of these cars sit in completely different segments to the BMW. The first four would sit in the segment below, whilst the 5th, an SUV would be entirely discounted from any discussion of product or marketing strategy for the Series 3.

For any vehicle the 'shared visitor' data can be tipped upside down and used to create a list of the cars against which a model competes most effectively. This 'reverse consideration set' is illuminating for some vehicles which seem to have presence in almost every other segment.

Here is a selection of data for the Volkswagen Golf, this time for the fourth quarter of 2012 in the UK.

Example Online Model Reverse Consideration Set

Volkswagen Golf | UK 2012 Q4

a selection of cars to which Golf was the primarily viewed alternative:

Audi A3	24%
Renault Megane Coupe	16%
Toyota Auris	14%
Kia Ceed	12%
Mercedes-Benz C-Class Saloon	12%
Volvo V70	10%
Toyota Land Cruiser V8	8%
Renault Twizy	6%

As can be seen the Golf is the most commonly viewed car alongside a diverse set of vehicles. Whilst the top four might be expected – all would be seen by automotive professionals as similar, ‘sporty’ hatchbacks. But the small selection of other vehicles shows the mixture of vehicles it is viewed alongside. In fact the Golf was the second most viewed car for 80 different models during the time period under review.

Very few cars have this depth of online reach within the vehicle market, so that they are considered alongside other cars in nearly every market segment.

But such success also presents a problem. Clearly Volkswagen has established the Golf in the thinking

of a broad audience: yet there must also be a certain amount of ambiguity about this car, making it ‘all things to all people’. How do you further promote the car and increase its presence without disturbing the mystique and delicate equilibrium that prevents it from being narrowly categorised by that broad audience?

Electric cars yet to take off

During the year it has been possible to track on-line interest in electric cars as Renault, Peugeot, Citroën, Mitsubishi and Opel/Vauxhall have all introduced models into the market. At present however, consumer interest appears relatively subdued. Of all visits to model pages across the sites we monitor, visits to electric vehicles make up under 1% at the present time.

Opel/Vauxhall Ampera, named the European Car of the Year in March 2012, was narrowly the most viewed of these models.

The launch of more ‘mainstream’ and competitively priced electric vehicles in the coming year may see this improve.

Opel / Vauxhall Ampera



What drives visitors to sites?

Search remains the primary source of traffic to car brand sites, with search engines delivering 42% of visitors.

Just under a fifth of visitors arrive by directly typing in the URL of the site – probably a higher proportion than for all websites, but explained by the simplicity of, and direct correlation between, the website address and the brands' names. (i.e. it doesn't require a great detective to work out 'ford.de' is likely to be the web address for Ford in Germany).

Traffic arriving by click-throughs from on-line media (banner advertising, etc.) remains significant at 14%, and if anything has increased slightly during the year.

Traffic from 'other' sources includes visits where the source is unattributable as well as very small, almost negligible amounts of traffic generated by email campaigns (1.2%) and from print campaigns (.01%). For the latter to be detected of course requires a site to maintain dedicated URLs/landing pages to be included in campaigns.

Social media – one of the preoccupations of online marketing specialists over the past couple of years – continues to generate very little direct traffic onto car brand sites, being responsible for just 0.3% of incoming traffic. This confirms the view that 'social' remains a distinct space, in which brands need to conduct a different, and appropriate, set of activities, rather than crudely treating it as a 'funnel' into their existing touch points.

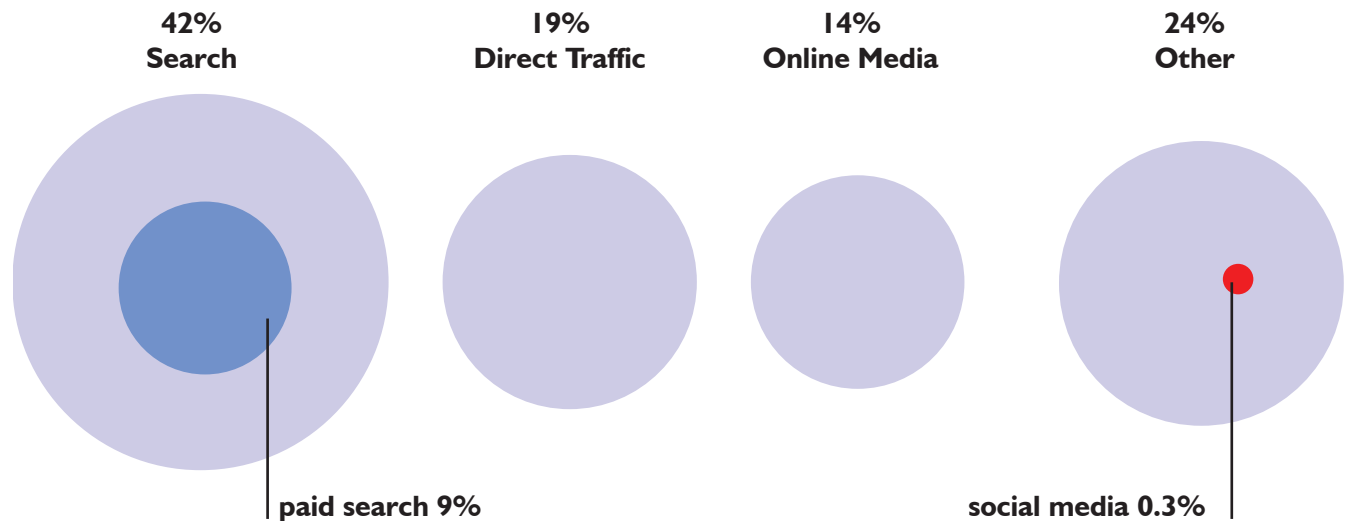
Returning to search briefly, approximately 9% of all site traffic is a 'paid' search – i.e. the brand has paid the search engine to receive each of those click-throughs. That implies, in terms of just our sample, that there were 37 million visitors arriving as a result of search transactions.

Valuation of search terms is extremely problematic with the cost of a search 'pay per click' campaigns quoted anywhere between €0.5 and €3.50 per

visitor. However, any value you assign to a simple calculation of the cost to the industry of acquiring this number of visitors through paid search suggests a huge amount is being spent by car brands on this activity.

The search engines' status as the gateway to this online audience, and the monopoly of one search provider in particular, will continue to be problematic to the industry.

Typical sources of traffic to car brand sites 2012 across 'Big 5 Markets'



'other' sources include: social media, e-mail, print media and visits for which no source can be attributed

When visitors come to sites

The daily pattern of traffic to sites has remained largely unchanged over recent years. The graph of pageviews provides a clear picture of when people are doing the most 'stuff' on sites. Activity increases steadily from 9 o'clock in the morning, with a small peak immediately before lunchtime. Traffic then grows again during the afternoon, with the main plateau of traffic between 19:00 and 21:30 in the evening.

It is perhaps a sobering thought to realise that the majority of contact the online visitor is having with

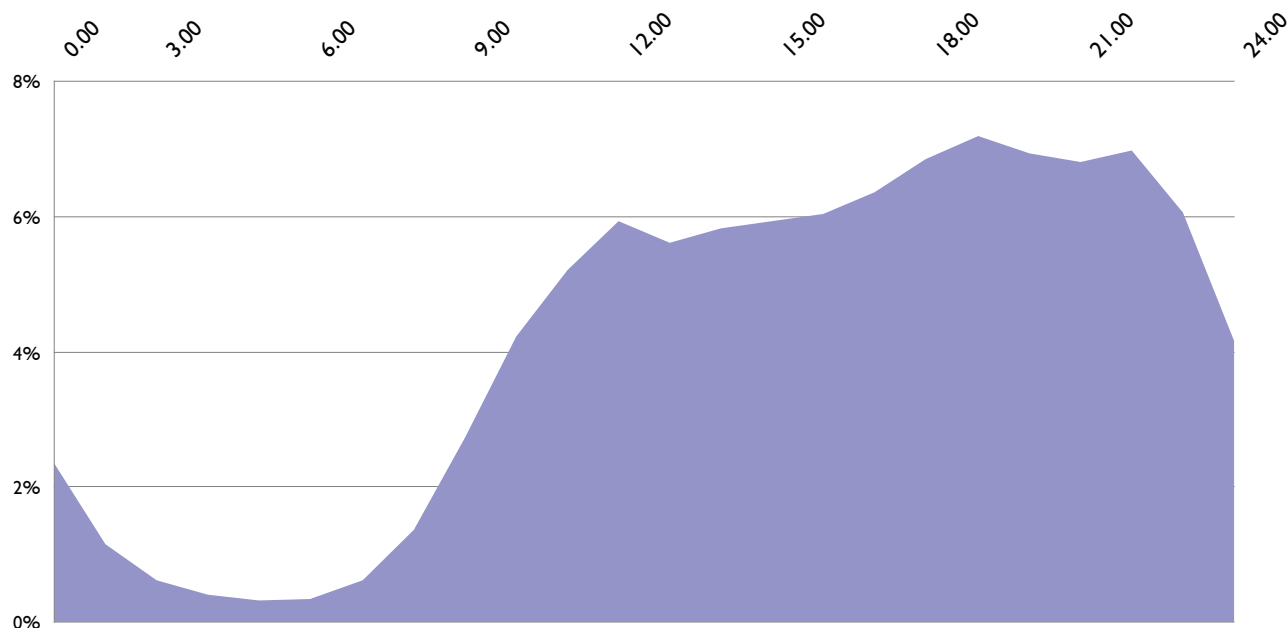
car brands takes place outside of 'office hours' (only 48% of page views take place between the hours of 9.00 and 17.00). How many brands could honestly say their own resources to respond to and engage with customers are configured to mirror this well defined daily cycle of customer interest?

The weekly cycle of traffic to car brand sites has also continued to evolve. Tuesday remains the peak day, the mid-week period has dampened down slightly, whilst traffic at the weekends has increased on both days. There was some country-by-country variation here and it is interesting to note that in both Germany

and France, Sundays have become the day of most intensive online activity, whilst Saturday has become the quietest day in all markets except Spain.

It is worth remembering that here we are looking at pageviews as the measure of activity rather than visitor numbers. Pageviews may imply higher levels of engagement amongst the audience at certain times, but clearly visitor behaviour needs to be monitored closely on individual sites – looking at a number of factors such as choice of destination, dwell time, repeat visits etc. – to accurately assess the points at which the site is 'doing business'.

Daily pattern of pageviews on car brand sites 2012 across 'Big 5 Markets'



How long do they stay, how many pages do they view?

The average individual visitor to a car brand site is pretty brutal in their manner and approach. They arrive, take what they want, then leave. Measuring behaviour across all the sites we track in the five markets gives us the following profile: the average visitor makes only 1.38 visits to a site (i.e. the majority only ever visit once), in 2012 they looked at just 3.11 pages, and their dwell time on a site was just 1 minute and 24 seconds before leaving. Of course, within the audience for any site, there will be a number of visitors who arrive 'by accident', or through curiosity, created by a link or banner, that is easily satiated. Such visitors clearly distort 'the average' performance data, however, even for 'engaged' visitors, those whose behaviour suggests they are visiting the site with some purpose, the numbers show a very matter of fact approach to using a site and then leaving.

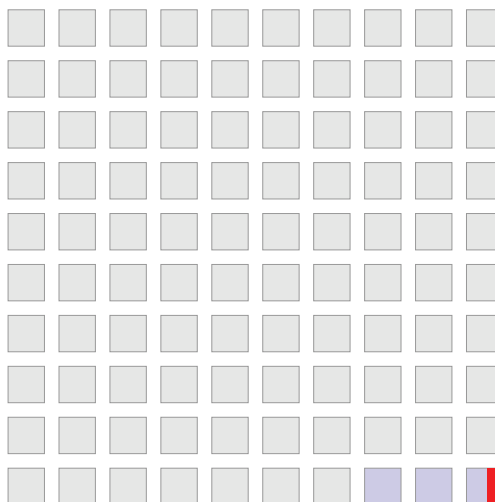
Completion rates

The percentage of visitors who engage with car brand sites and indicate an interest in progressing towards acquiring a new car remains small.

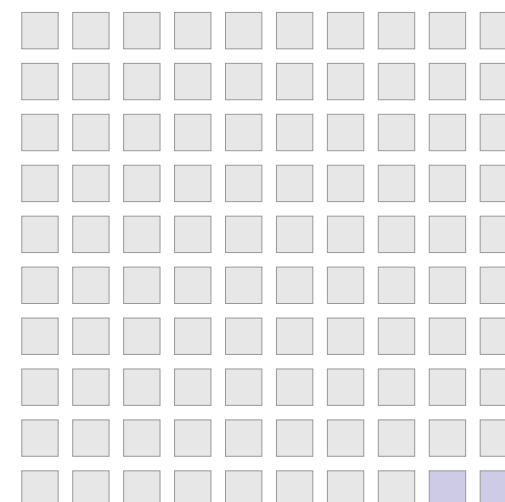
The diagrams below show how few complete significant 'intent to purchase' actions such as requesting a brochure or booking a test drive.

Yet this should not demotivate brand's online activity. The millions of visits still translate into many thousands of dealership visits and test drives, with, as we know, a high conversion rate to sales.

3.8% of visitors start a brochure request, only 0.4% complete the request.



2.2% of visitors start a test drive request, only .07% complete the request.



Section 2: Trends

Automotive brands embrace behavioural targeting as market shrinks further

A tough European car market – the worst last year since 1995 – means that brands are working ever harder to attract customers. As the web has become central to the new car buyers' selection process manufacturers are realising that their websites need to change from being digital brochureware, a largely passive function, into active mechanisms that can engage with and influence the decision making process of the site visitors who are 'in market' for a new car.

Behavioural targeting is a combination of technologies that seeks to interpret visitor behaviour on a website, in real time, and then in response, present individually tailored information that will engage the visitor and potentially convert them into a customer.

Until now, car brands have been slow adopters of this technology, mainly because of the protracted nature of car purchase. This means that the objective of targeting in this context is to do with 'influencing', and it does not produce the immediate sales results measurable on many e-commerce sites. For that type of site an instantaneous uplift in sales to the targeted groups, compared to a control group, provides the simple business case for implementation of targeting.

Targeting works through a set of initial rules, which define at what point a site visitor might be served different content. In the case of an automotive site, the length of stay on the site, the sections visited, and specific actions – such as configuring a vehicle to an individual specification, or researching price

Number of car brands using targeting on national websites 2012

	DE	ES	FR	IT	UK
2010	3	2	1	3	2
2011	4	3	2	4	5
2012	12	7	5	12	12

information – will be the preset triggers for the site to serve an inquiry, offer, or suggestion to seek to engage the customer.

The rules that serve the content will be changed over time, either by revising them in reaction to the unfolding and changing pattern of response, or, through the use of self-learning algorithms.

The invitation to engage usually takes the form of a ‘pop-in’ or ‘pop-under’ which minimizes intrusiveness for those visitors who are not ready to interact. Behavioural targeting successfully engages a greater number of site visitors than passive customer touch points. For example, serving a ‘Test Drive Request’ form at an appropriate time leads to far higher response levels than if visitors are left to find and initiate the form/request.

Put simply, the brands already utilising this technology are ‘harvesting’ more return from their website’s existing visitor base.

The invitation to engage can take many forms: an invitation to request a brochure or test drive, or an invite to chat, or a combination of different actions.

In addition to this an incentive may be added – such as a printable coupon or value added benefit to the customer such as a free valuation of their current vehicle. Here the benefit is not only to gain more leads, but also to provide a means of tracking the effectiveness of the lead generating process through a linkage from on-line to off-line.

Sophus3 has developed a suite of Active Engagement

services specifically tailored through our understanding of the on-line behaviour of car buyers. Based on analysis of multiple brand implementations we see that targeting doubles the number of leads generated from existing traffic compared to ‘passive’ lead drivers. Yet the average lead quality in terms of lead conversion to sale, measured for test drives and ‘call-me-backs’, is only slightly lower (-5%) than the leads from the previous passive mechanisms.

With little sign of the market improving, our expectation is that behavioural targeting will become an increasing priority for the majority of car brands in Europe during the year ahead, anxious not to give ground to any competitor in the search for elusive buyers.

How can we help you?

Choose from the options below

Request a call back

Tell us how we can help and we'll call you back

TEST DRIVE

BROCHURE

HELP & ADVICE

Talk to us live now

Use our Live Chat to speak directly to an advisor

LIVE CHAT - ONLINE

Order or book online

Book a test drive or order a brochure using our online services

TEST DRIVE

BROCHURE

SERVICE & MAINTENANCE

Automotive brands work to improve their fulfilment/response to on-line

How well and how quickly do car brands actually respond to an expression of interest that a customer makes online? For a number of years this has been a problematic area, with brands worried that their dealers' response was sometimes, at best, 'sluggish'. For their part, many dealers viewed the Internet leads sent through by some brands as often poorly qualified and of little value ("Mr M. Mouse is waiting to hear from you about his next car purchase. Please contact him via: mickey@disneyworld.com...")

A study published by sophus3 last year measures how well brands and their dealers responded to online enquiries and showed the progress made in the intervening year since the previous study was conducted.

The study was based on a 'mystery shopping' exercise conducted by sophus3 across the major car brands in the 'Big 5'. A number of requests for a test drive for each brand are made using the appropriate online form: we then measure exactly how long it takes to respond with a convenient offer of a date and time for a test-drive. (As well as measuring the speed of response, the study separately measures the time taken to complete, and the complexity of, the request form as this is potentially as big an obstruction to generating a sales pipeline as slow response times.)

In terms of response time the UK showed the best improvement over the previous year's measurement, with a 55% reduction to an 8 hour average response

time. Brands in France also showed an average improvement of 30% bringing them into line with Germany to achieve a 39 hour response time.

The overall result shows that the efforts of auto manufacturers and dealers are yielding better results. However the variation in response times generating these averages was considerable with, most worryingly, some brands failing to respond at all to three out of the ten separate requests.

It is also chastening to think that leading dealer groups in the US – such as AutoNation – make it mandatory for staff to respond to an online request within 20 minutes during working hours.

We will be publishing an update to the study in early spring of 2013. Please email contact.en@sophus3.com if you would like to receive the results.

Test Drive Request Form Response Time

Country	FR	DE	IT	ES	UK
Average Response Time (in hours)	39	39	36	73	8
Improvement in response time year on year	30%	9%	n/a	n/a	55%
'Best Practice' Brand	Lancia	Citroën	Land Rover	Opel	Honda

Mobile and tablets gather momentum

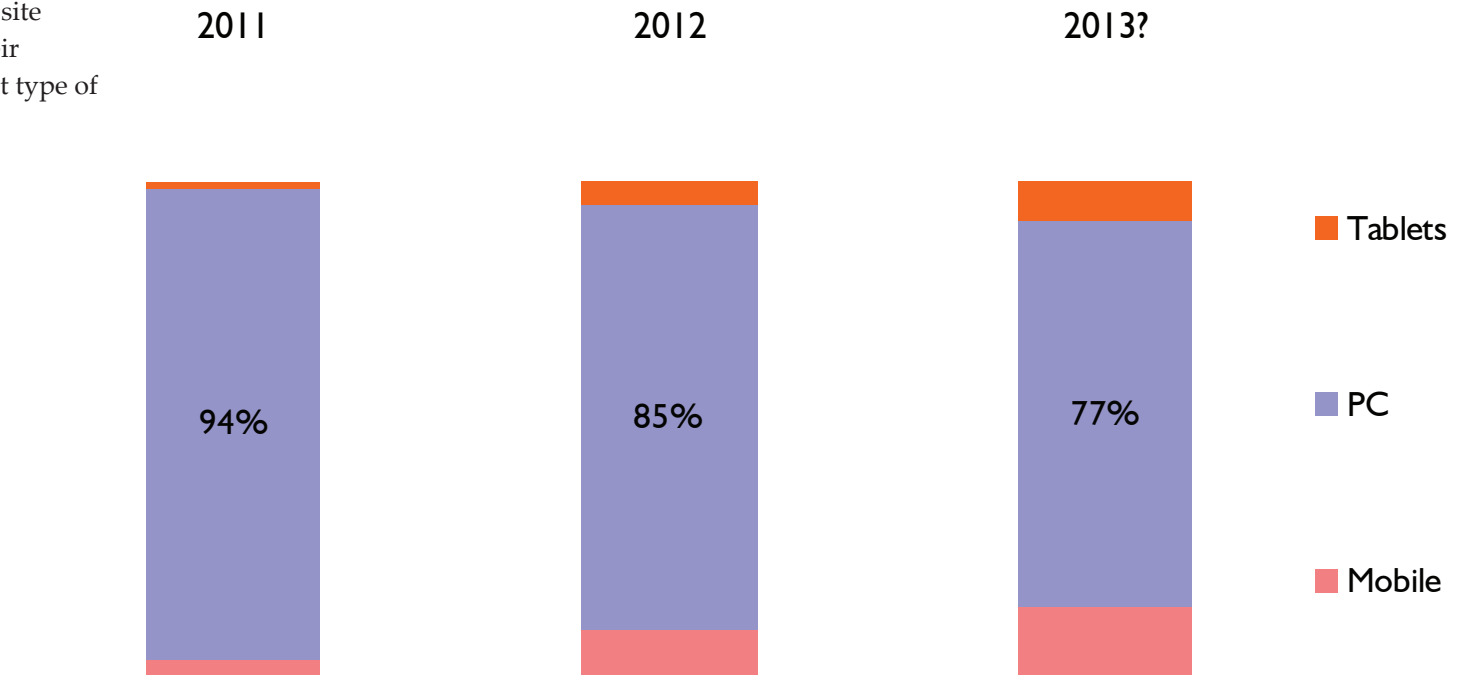
Whilst there is much discussion of the growth of the use of mobile and tablet type devices to access the web, the evidence from our observation of device types on car brand sites is that the majority of visitors continue to look at content through a conventional desktop or laptop device. In 2012 85% of visitors to sites were still viewing car brand content in this way. However the rate of growth of the alternatives during the last 12 months can only be described as spectacular. The percentage accessing sites using a mobile phone nearly trebled; the number using a tablet increased three and a half times.

Sustained growth of the use of these device types will mean that by the end of 2013 automotive site webmasters can expect nearly a quarter of their visitors to access their sites through a different type of device with smaller displays.

To turn this device shift into an opportunity, brands need to understand that 'mobile friendly' demands more than being able to view a website through a shrunken interface. The mobile user presents different demands on the architecture of websites but also offers different opportunities – particularly around location information.

Longer term we may also see a device trend develop in the exact opposite direction. With the majority of flat panel Televisions now being shipped with Internet capabilities we can expect a whole different set of expectations developing around High Definition content through people surfing the web via their TV.

Change in devices accessing car brand sites across 'Big 5 Markets'

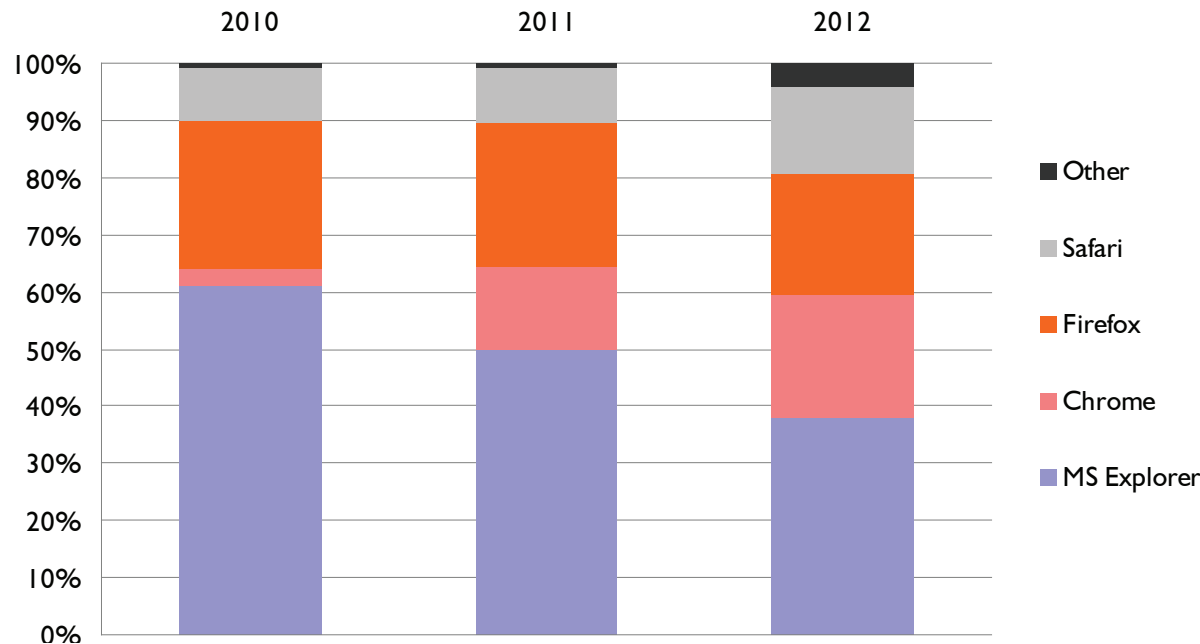


Browser diversity increases

The use of browsers we detected on car brand sites in the Big 5 markets show that Microsoft's Internet Explorer continues to lose share, chiefly to Chrome and, perhaps more interestingly, to Safari, the default browser for Apple products. (Firefox does, currently, appear to be the old 'new kid on the block'.) Other than reiterating the need for web masters to be constantly aware of cross browser compatibility issues, the shifts in browser preference might seem both academic and trivial. However, there are important impacts in two areas.

Firstly, some types of content are effectively excluded by the user's choice of browser: for example animated content delivered using 'Adobe Flash' technology is effectively invisible to standard installations of the Safari browser, whilst some java plug-ins for acrobat/.pdf files are disabled in both Safari and the Firefox browser. Understandably many car sites have had to change or duplicate content in other formats to avoid it becoming invisible to some users. Vigilance is required to ensure that web sites remain future proofed against the upcoming generation of browsers.

Secondly, and perhaps of even greater importance is how current and future releases of each one treat website 'cookies'. Cookies – text files that are stored on the user's computer – are used by websites for many functions, some simple, to aid user navigation, others more complex. Safari rejects all 'third party' cookies by default – those issued by a different, external domain such as analytics cookies. Users rarely change their browser's default cookie settings so this presents potential problems for sites that depend on such cookies for analytics or other functions. Internet Explorer is also set to reject a subset of third party cookies. □



	2010	2011	2012
MS Explorer	61%	50%	38%
Chrome	3%	14%	21%
Firefox	26%	25%	21%
Safari	9%	9%	15%
Other	1%	1%	4%

sophus3

About sophus3

We are at the forefront of designing and applying technology and processes that monitor consumer behavior in the online sector.

Our key strength lies in our ability to identify and gather the right data and information, combined with advanced and objective analysis. We provide expert services and support to companies in areas where they don't always have in-house expertise.

The eDataXchange project

eDataXchange (eDX) is a sector and country collaborative project that monitors consumer behaviour across websites. It enables participants to set targets, benchmark their performance against others and understand the effect of both their own and competitors' marketing campaigns on traffic to their websites.

Auto Market Intelligence

AMI is sophus3's quarterly journal of ideas and analysis aimed at e-business professionals working in, or supporting, the automotive sector. The journal focuses on innovation and developments that are impacting the sector, as well as providing a detailed review of on-going brand performance.

If you have any questions or comments we would be happy to respond if you email: luca.andreose@sophus3.com, or, contact.en@sophus3.com

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