

# **VERTICAL VISIBILITY INDEX: AUTOMOTIVE**

**ANALYSIS CONDUCTED BY ICROSSING**

JULY 2008

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## KEY FINDINGS

- + When analyzing Original Equipment Manufacturers (OEMs), Ford Motor Company has the largest natural visibility share of market with 22%. They are followed by General Motors Corporation (17%), Chrysler LLC (15%), American Honda Motor Company (11%), and Mercedes-Benz USA (8%). Together, these top five companies make up more than 70% of the total natural search visibility share of market across the automotive keyword set.
- + At the brand level, analysis shows that Ford has the highest visibility for a brand with 18% of the natural search visibility market share, followed by Chrysler (12%), Honda (10%), Pontiac (8%), and GMC (6%).
- + Of the top 25 keywords by search volume, eight keywords had no visibility for any brand: used car, buy a car, race cars, muscle car, car search, auto loan, car loan, and used car prices.
- + Ford Motor Company and Toyota Motor Sales USA are the only OEMs with visibility in the top volume keyword, car.
- + Of the top 50 most visible URLs based on first page natural rankings, automobiles.honda.com has the highest position (22nd) for this keyword set within the brand URLs, followed by pontiac.com (40th), fordvehicles.com (47th), and toyota.com (49th).
- + Hyundai Motor Company has the greatest paid search media market share for Google with 30%, followed by General Motors Corporation (22%), and Chrysler LLC (17%). Together, these three OEMs have almost 70% of the overall paid search media market share for Google for the automotive keyword set.
- + Combining the information from natural and paid search media analyses, Chrysler LLC, General Motors Corporation, and Nissan North America are doing the best job of approaching search engine marketing with a synergistic approach.

## INTRODUCTION

The purpose of this report is to follow-up iCrossing's Search 500 Index: Automotive report from 2007, and take a closer look at Original Equipment Manufacturers (OEMs), within the U.S. automotive industry. By looking at natural search visibility and paid search media market share across search engines, we can compare each brand's online presence to their brand coverage in the market place. This report analyzes the natural search visibility and paid search media market share of 19 OEMs representing 48 brands on a set of keywords that are common automotive industry consumer searches.

For the Vertical Visibility Index: Automotive report, iCrossing analyzed natural search engine position data for the following U.S. search engines: Google, Yahoo!, MSN, Ask and AOL. Weighting scores using search engine share of market, keyword volume and keyword positions across each engine, iCrossing used its new proprietary Industry Index algorithm to compute natural search visibility share of market for a set of automotive keywords. Since the score generated for each company represents its share of market across a fixed set of competitors, keywords, and search engines, it is then comparable over time to explore trends. Additional information about the Industry Index is included in the methodology section along with the comprehensive lists of competitors, keywords, and URLs are outlined in the Appendix.

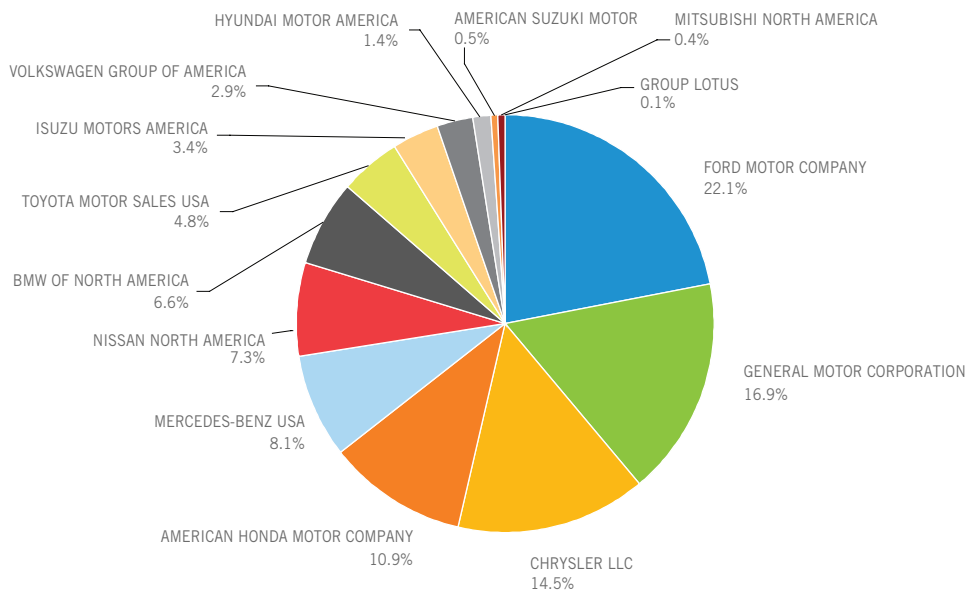
For the same set of keywords and URLs, iCrossing also used Ad Spend Estimator, a tool used to estimate paid search media market share on Google. By combining data about average rank, coverage and CPC by keyword, iCrossing can estimate the paid search media share of market for each set of OEM URLs. Like Industry Index, the market share generated for each company represents its share of market across a fixed set of competitors and keywords and is therefore comparable over time to explore trends. iCrossing plans to update this report in the future to explore these trends and track changes across both paid and natural search media.

FINDINGS

NATURAL SEARCH VISIBILITY SHARE OF MARKET: OEM LEVEL ANALYSIS

Overall, Ford Motor Company has the largest natural visibility share of market with 22 percent. They are followed by General Motors Corporation (17%), Chrysler LLC (15%), American Honda Motor Company (11%) and Mercedes-Benz USA (8%). Together, these top five companies make up more than 70 percent of the total natural search visibility share of market. As OEMs, Subaru of America, Tata Motors Limited, Porsche Cars North America, Fiat SPA, and Aston Martin have no natural search visibility share of market for the automotive keyword set. All other OEMs included in this study have less than 10 percent of overall natural search visibility share of market.

NATURAL SEARCH VISIBILITY SHARE OF MARKET (OEM LEVEL)



Ford Motor Company has power in numbers; five of the 47 (11%) of the automotive companies analyzed in this study under Ford Motor Company, but has greater-than-expected market share (22%) giving them a natural search visibility index of 207\*. When controlling for the number of brands each OEM has by using the natural search visibility index, other companies besides Ford Motor Company also have higher visibility than expected based on their number of brands. These OEMs include American Honda Motor Company (257), Chrysler LLC (227), Nissan North America (172), Isuzu Motors America (162), Mercedes-Benz USA (126), and BMW of North America (104).

**VISIBILITY INDEX (OEM LEVEL)**

OEM	Natural Search Visibility Share of Market (%)	% of Brands	Natural Search Visibility Index*
American Honda Motor Company	10.9%	4.3%	257
Chrysler LLC	14.5%	6.4%	227
Ford Motor Company	22.1%	10.6%	207
Nissan North America	7.3%	4.3%	172
Isuzu Motors America	3.4%	2.1%	162
Mercedes-Benz USA	8.1%	6.4%	126
BMW of North America	6.6%	6.4%	104
General Motors Corporation	16.9%	17.0%	100
Toyota Motor Sales USA	4.8%	6.4%	75
Hyundai Motor America	1.4%	4.3%	34
Volkswagen Group of America	2.9%	8.5%	33
American Suzuki Motor	0.5%	2.1%	25
Mitsubishi North America	0.4%	2.1%	20
Group Lotus	0.1%	2.1%	4
Subaru of America	0.0%	2.1%	1
Tata Motors Limited	0.0%	6.4%	0
Porsche Cars North America	0.0%	2.1%	0
Fiat SPA	0.0%	4.3%	0
Aston Martin	0.0%	2.1%	0

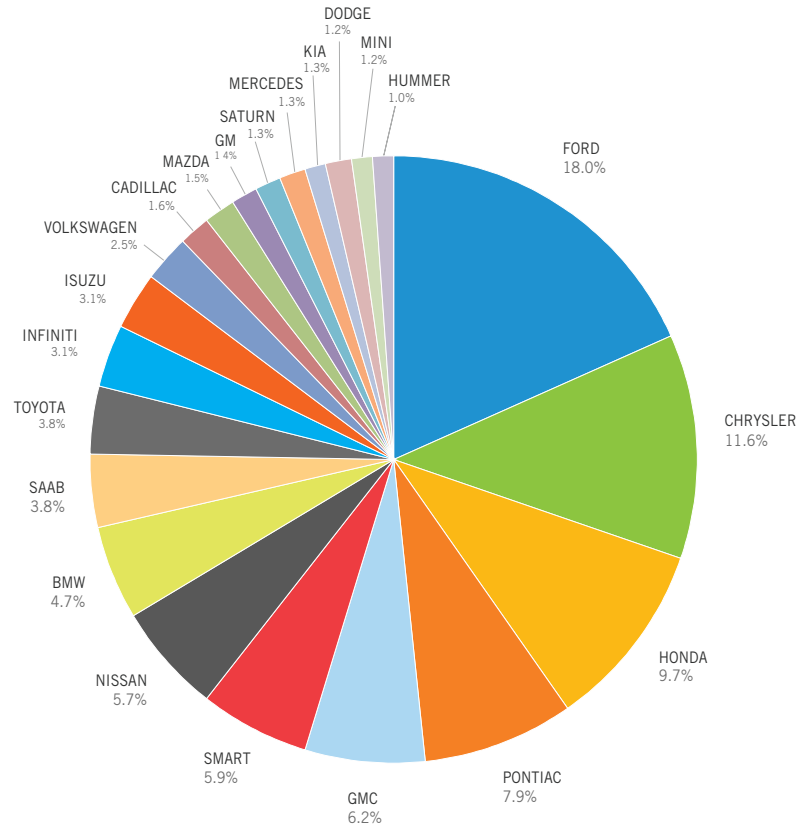
\* Visibility Index > 100 shows brands with higher natural search visibility than expected based on the number of brands represented by each OEM

For the OEM level analysis, we are looking at the highest position for any URL in the brand family, so many may argue that the number of brands, and therefore the brand index, is less important than the overall visibility for any brand URLs depending on the company’s objective. For that reason, we also looked closely at individual brands.

**NATURAL SEARCH VISIBILITY SHARE OF MARKET: BRAND LEVEL ANALYSIS**

Ford has the highest visibility for a brand with 18 percent of the natural search visibility market share, followed by Chrysler (12%), Honda (10%), Pontiac (8%) and GMC (6%). American Honda Motor Company has 100% of their natural search market share coming from honda.com and is lacking visibility on the Acura brand. Pontiac and GMC are driving the success of General Motors Corporation. Ford is the top performing Ford Motor Company brand, followed by weak performances by other Ford Motor Company brands, and all of the Chrysler LLC brands have visibility. As brands, Audi, Land Rover, Subaru, Acura, Lincoln, Scion, Porsche, Hyundai, Bentley, Lamborghini, Maybach, Ferrari, Maserati, Aston Martin, Tata and Jaguar have no visibility.

NATURAL SEARCH VISIBILITY SHARE OF MARKET (BRAND LEVEL)



NATURAL SEARCH VISIBILITY SHARE OF MARKET (BRAND LEVEL)

Brand	Natural Search Visibility Share of Market (%)	Brand	Natural Search Visibility Share of Market (%)	Brand	Natural Search Visibility Share of Market (%)
Ford	18.0%	Saturn	1.3%	Land Rover	0.0%
Chrysler	11.6%	Mercedes	1.3%	Subaru	0.0%
Honda	9.7%	Kia	1.3%	Acura	0.0%
Pontiac	7.9%	Dodge	1.2%	Lincoln	0.0%
GMC	6.2%	Mini	1.2%	Scion	0.0%
Smart	5.9%	Hummer	1.0%	Porsche	0.0%
Nissan	5.7%	Suzuki	0.5%	Hyundai	0.0%
BMW	4.7%	Lexus	0.5%	Bentley	0.0%
Saab	3.8%	Rolls-Royce	0.5%	Lamborghini	0.0%
Toyota	3.8%	Mitsubishi	0.4%	Maybach	0.0%
Infiniti	3.1%	Jeep	0.1%	Ferrari	0.0%
Isuzu	3.1%	Volvo	0.1%	Maserati	0.0%
Volkswagen	2.5%	Buick	0.1%	Aston Martin	0.0%
Cadillac	1.6%	Lotus	0.1%	Tata	0.0%
Mazda	1.5%	Mercury	0.1%	Jaguar	0.0%
GM	1.4%	Audi	0.0%	--	--

Diving deeper into the keyword level data, visibility on the top five keywords by search volume is split among only eight brands: GM, Pontiac, GMC, Saab, Ford, Toyota, BMW, Volkswagen, Mercedes and Chrysler. These brands represent seven of the OEMs. Ford Motor Company and Toyota Motor Sales USA are the only OEMs with visibility on the top volume keyword, car.

**NATURAL SEARCH VISIBILITY SHARE OF MARKET FOR TOP 25 KEYWORDS**  
BY DESCENDING KEYWORD VOLUME (OEM LEVEL)

KEYWORDS)	KD Volume*	General Motor Corporation	Ford Motor Company	Toyota Motor Sales USA	American Honda Motor Company	Hyundai Motor America	BMW of North America	Volkswagen Group of America	Mercedes-Benz USA	Nissan North America	Chrysler LLC	American Suzuki Motor	Subaru of America	Mitsubishi North America	Porsche Cars North America	Fiat SPA	Aston Martin	Isuzu Motors America	Group Lotus	Tata Motor Company	
car	639,182	0%	59%	41%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	100%
truck	470,183	44%	56%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	100%
auto	363,369	25%	75%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	100%
vans	244,228	42%	0%	0%	0%	0%	0%	0%	58%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	100%
convertible	95,462	24%	3%	0%	0%	0%	11%	6%	0%	0%	56%	0%	0%	0%	0%	0%	0%	0%	0%	0%	100%
used car	91,724	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
suv	83,982	7%	15%	6%	5%	6%	0%	9%	0%	18%	0%	0%	0%	0%	0%	0%	0%	34%	0%	0%	100%
pickup	56,878	0%	81%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	19%	0%	0%	100%
buy a car	42,372	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
coupe	41,873	12%	0%	0%	46%	0%	14%	1%	2%	25%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	100%
concept cars	39,586	8%	23%	15%	0%	0%	0%	17%	0%	0%	0%	18%	0%	19%	0%	0%	0%	0%	0%	0%	100%
automobile	38,856	42%	0%	0%	41%	18%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	100%
new car	37,146	23%	18%	42%	0%	0%	16%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	100%
race cars	35,122	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
muscle car	34,411	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
car search	28,859	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
auto loan	23,034	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
smart car	22,481	0%	0%	0%	0%	0%	0%	0%	100%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	100%
car loan	20,652	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
hatchback	19,689	0%	42%	0%	0%	7%	0%	0%	0%	51%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	100%
used car prices	19,270	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
mini van	18,106	3%	3%	9%	37%	6%	35%	0%	0%	0%	7%	0%	0%	0%	0%	0%	0%	0%	0%	0%	100%
car show	17,196	0%	100%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	100%
sports car	17,017	0%	0%	0%	0%	0%	0%	0%	0%	0%	43%	0%	0%	0%	0%	0%	0%	0%	57%	0%	100%
station wagon	17,008	0%	0%	0%	0%	0%	0%	44%	33%	0%	24%	0%	0%	0%	0%	0%	0%	0%	0%	0%	100%

General Motor Corporation, Ford Motor Company, BMW of North America, Nissan North America and Chrysler LLC are the only OEM companies that have multiple brands with visibility on the same keywords. Of the top 25 keywords by search volume, eight keywords had no visibility for any brand: used car, buy a car, race cars, muscle car, car search, auto loan, car loan and used car prices. Together these keywords have a 10.3 percent of the total search volume, but none of the U.S. automotive brands are ranking for these keywords. Of the 102 keywords included in the industry keyword set, only 62 (61%) of them had visibility for any of the automotive brands, leaving many of the keywords with no auto brand visibility.

**MOST VISIBLE URLS**

By creating a Keyword Analysis Report (KAR), iCrossing was also able to analyze which URLs are most visible in this keyword set outside of the chosen OEM competitors by counting the number of first page rankings for each URL for all keywords in the set. Of the Top 50 Most Visible URLs, automobiles.honda.com has the highest position (22nd) for this keyword set within the brand URLs, followed by pontiac.com (40th), fordvehicles.com (47th), and toyota.com (49th).

In the top ranking positions, we see mostly third-party information aggregators such as edmunds.com, cars.com, autotrader.com, kbb.com, and automotive.com. Also present are information sites (Wikipedia.com), auto group sites (autos.yahoo.com, autos.msn.com), group sites (groups.google.com), and video sharing sites (YouTube.com).

**TOP 50 MOST VISIBLE WEBSITES FOR AUTOMOTIVE KEYWORDS, MAY 2008**

DOMAIN	TOTAL RANKINGS	GOOGLE*	YAHOO!	AOL**	MSN	ASK.COM
www.edmunds.com	214	51	49	56	24	34
en.wikipedia.org	193	33	45	38	39	38
www.cars.com	154	36	51	41	12	14
www.kbb.com	74	16	12	18	8	20
www.automotive.com	69	24	8	24	4	9
www.autotrader.com	69	16	10	24	5	14
autos.yahoo.com	62	15	25	15	5	2
www.autobytel.com	60	16	4	20	6	14
www.car.com	51	6	23	4	17	1
www.carsdirect.com	50	19	3	19	3	6
www.bankrate.com	50	9	14	11	5	11
www.carbuyingtips.com	49	18	0	16	2	13
www.nadaguides.com	49	15	1	15	5	13
www.autoweb.com	43	9	9	9	5	11
na.link.decdna.net	38	0	38	0	0	0
autos.msn.com	35	12	0	10	8	5
www.automobilemag.com	34	7	10	7	5	5
www.fueleconomy.gov	33	8	7	8	3	7
www.motortrend.com	32	12	5	10	0	5
1.pttf.com	32	0	32	0	0	0
www.youtube.com	28	15	1	9	0	3
automobiles.honda.com	27	6	8	6	3	4
feedpoint.net	26	0	26	0	0	0
www.carsmart.com	26	4	9	4	4	5
auto.howstuffworks.com	25	9	4	9	1	2
www.eloan.com	22	7	1	9	1	4
www.caranddriver.com	22	5	5	5	2	5
www.automart.com	21	6	6	6	2	1
www.truckpaper.com	20	5	5	4	4	2
www.nada.com	20	7	3	7	1	2
reverso2.com	19	0	0	0	0	19
autos.aol.com	17	6	2	3	4	2
www.autosite.com	17	5	1	3	0	8
www.internetautoguide.com	16	6	0	8	1	1
www.nada.org	16	4	4	4	1	3
inkt.reporting-center.com	15	0	15	0	0	0
www.intellichoice.com	15	4	1	4	1	5
www.epa.gov	15	4	2	4	1	4
www.carfax.com	15	2	3	2	1	7
www.pontiac.com	15	5	4	5	0	1
www.getauto.com	15	3	5	5	1	1
www.carmax.com	14	5	2	4	2	1
groups.google.com	14	0	0	0	14	0
www.enterpriseautosales.com	13	3	4	3	3	0
www.chevrolet.com	13	3	4	3	3	0
www.carprices.com	13	3	0	4	3	3
www.fordvehicles.com	12	3	4	3	1	1
cars.com	12	0	1	0	11	0
www.toyota.com	12	3	4	3	1	1
www.lendingtree.com	12	5	0	5	1	1

Executed on May 20, 2008. Results represent first page rankings for 102 automotive keywords.

\* Results provided by third party engine

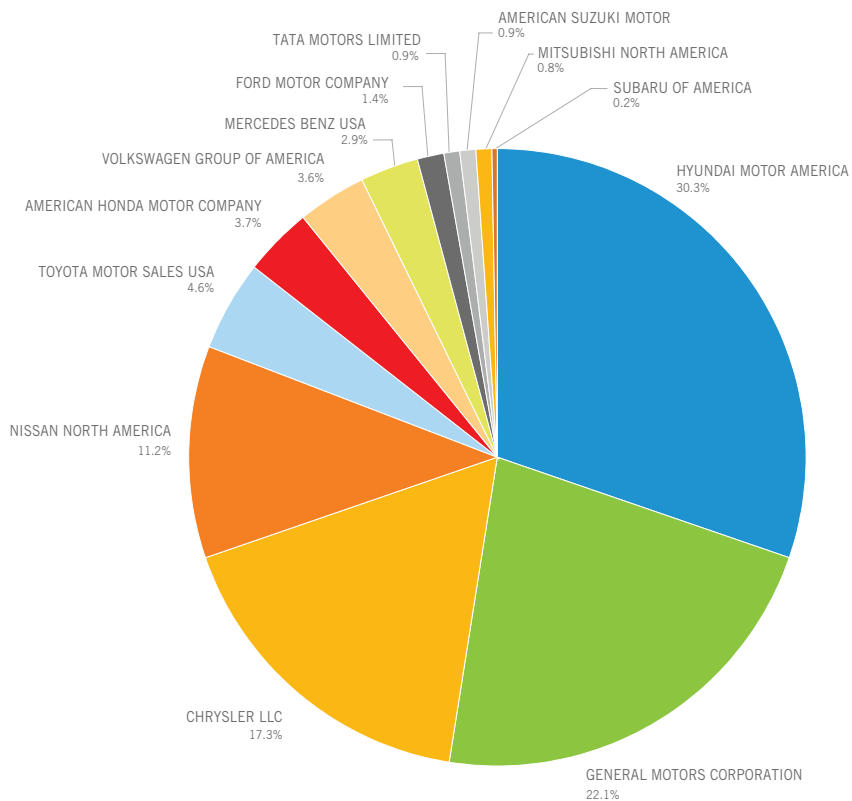
\*\* Contains results from Google

**PAID SEARCH MEDIA SHARE OF MARKET (OEM LEVEL)**

iCrossing wanted to determine if the OEMs with the highest natural search visibility share of market were in sync with the highest estimated paid search media share of market. Using AdGoroo and Google AdWords data, iCrossing’s proprietary Ad Spend Estimator tool was used to estimate the paid search media share of market on Google for the same set of OEMs and automotive keywords used in the natural search visibility share of market calculations. Data was collected from April 14, 2008 through May 28, 2008 and provided us with estimated paid search media share of market for comparison.

Hyundai Motor Company has the greatest paid search media market share of Google paid search media with 30 percent, followed by General Motors Corporation (22%), and Chrysler LLC (17%). Together, these three OEMs have almost 70 percent of the overall paid search media market share on Google for the automotive keyword set.

**ESTIMATED PAID SEARCH MEDIA SHARE OF MARKET ON GOOGLE (OEM LEVEL)**



Of the remaining 16 OEMs, 10 have a portion of the market share, led by Nissan North America (11%) and Toyota Motor Sales (5%). Six of the companies did not appear in paid search media on Google for any of the automotive keywords, they include Porsche Cars North America, Mercedes-Benz USA, Fiat SPA, Aston Martin, Isuzu Motors America and Group Lotus.

**ESTIMATED PAID SEARCH MEDIA SHARE OF MARKET ON GOOGLE (OEM LEVEL)**

OEM	Estimated Paid Search Market Share (%)	% of Brands	Paid Search Share of Market Index**
Hyundai Motor America	30.3%	4.3%	704
Nissan North America	11.2%	2.7%	413
Chrysler LLC	17.3%	6.4%	270
General Motors Corporation	22.1%	17.0%	130
American Honda Motor Company	3.7%	4.3%	87
Toyota Motor Sales USA	4.6%	6.4%	72
Mercedes-Benz USA	2.9%	6.4%	46
American Suzuki Motor	0.9%	2.1%	44
Volkswagen Group of America	3.6%	8.5%	43
Mitsubishi North America	0.8%	2.1%	40
Tata Motors Limited	0.9%	6.4%	14
Ford Motor Company	1.4%	10.6%	13
Subaru of America	0.2%	2.1%	9
Porsche Cars North America	0.0%	2.1%	0
BMW of North America	0.0%	6.4%	0
Fiat SPA	0.0%	4.3%	0
Aston Martin	0.0%	2.1%	0
Isuzu Motors America	0.0%	2.1%	0
Group Lotus	0.0%	2.1%	0

\*\* Visibility Index > 100 shows brands with higher paid search share of market than expected based on the number of brands represented by each OEM.

Once again, these values were indexed to control for the number of brands represented by each OEM. Hyundai Motor America has an index of more than 700\*\* suggesting that the OEM has more than seven times the paid search media share of market than expected for the Hyundai and Kia brands. The only other OEMs with a larger than expected paid search media share of market were Nissan North America (413), Chrysler LLC (270) and General Motors Corporation (130).

**NATURAL SEARCH VISIBILITY SHARE OF MARKET AND PAID SEARCH MEDIA SHARE OF MARKET COMPARISON (OEM LEVEL)**

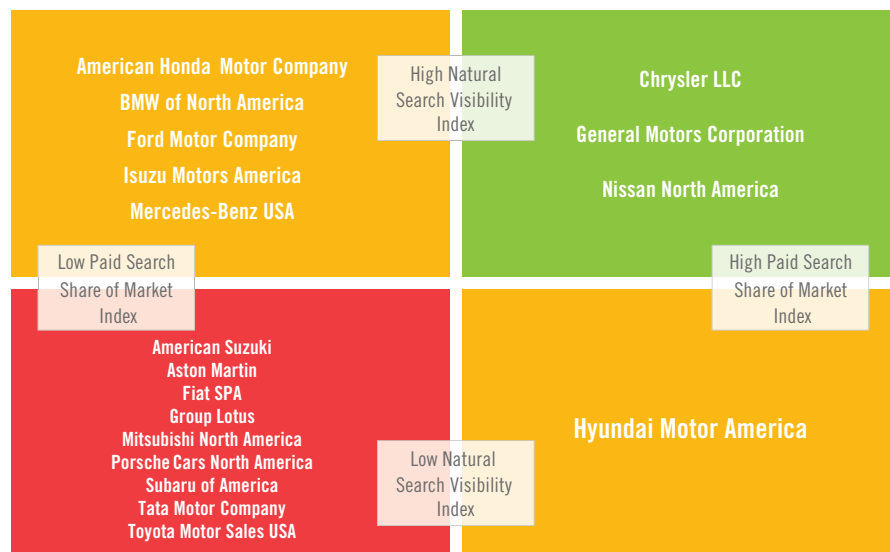
In order to evaluate natural and paid search media tactics by OEM, iCrossing compared natural search visibility share of market calculations with estimated paid search media share of market calculations from the above analysis. iCrossing acknowledges that natural search visibility share of market is calculated across all U.S. search engines while paid search media share of market in this study is calculated for Google only due to available data. However, according to ComScore, Google had more than 60 percent of the total search engine share of market in April 2008 across the Top Five U.S. search engines. Therefore, for the sake of demonstration, these values will be displayed together in the following analysis.

**NATURAL SEARCH VISIBILITY INDEX AND PAID SEARCH MEDIA SHARE OF MARKET INDEX (OEM LEVEL)**

OEM	Natural Search Visibility Index*	Paid Search Share of Market Index*
American Honda Motor Company	257	87
American Suzuki Motor	25	44
Aston Martin	0	0
BMW of North America	104	0
Chrysler LLC	227	270
Fiat SPA	0	0
Ford Motor Company	207	13
General Motors Corporation	100	130
Group Lotus	4	0
Hyundai Motor America	34	704
Isuzu Motors America	162	0
Mercedes-Benz USA	126	46
Mitsubishi North America	20	40
Nissan North America	172	413
Porsche Cars North America	0	0
Subaru of America	1	9
Tata Motors Limited	0	14
Toyota Motor Sales USA	75	72
Volkswagen Group of America	33	43

By evaluating both the natural search visibility index and the paid search media share of market index, we can determine if companies are taking a holistic approach to search engine marketing. With an index of greater than 100 for both paid and natural search media, OEMs are demonstrating that they have exceeded expectations for both paid and natural search media. Comparing these values graphically, we can determine four categories of OEMs displayed below.

**NATURAL SEARCH VISIBILITY INDEX AND PAID SEARCH SHARE OF MARKET INDEX (OEM LEVEL)**



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## CONCLUSION

The natural search competitive space for these automotive keywords is being dominated by third-party OEMs and information aggregations, but many OEMs analyzed are failing to keep up even with their competitors. General Ford Motor Company has the benefit of having a large number of brands, but like American Honda Motor Company, Chrysler LLC, Nissan North America, Isuzu Motors America, Mercedes-Benz USA and BMW of North America, it has more than its fair share of natural search visibility based on the visibility index. In the paid search media comparison, Hyundai Motor America, Nissan North America, Chrysler LLC, and General Motors Corporation have greater than expected paid search media market share on Google based on the number of brands represented by each OEM.

When comparing the natural search visibility index to the paid search media share of market index, only three OEMs appear to be performing high across the board: Chrysler LLC, General Motors Corporation, and Nissan North America. Our analysis shows that these three brands are doing the best job of approaching search engine marketing with a synergistic approach. Other brands need to increase their paid search media coverage; these include American Honda Motor Company, BMW of North America, Ford Motor Company, Isuzu Motors America, Mercedes-Benz USA, and Nissan North America. By increasing paid search media share of market, they will also have higher-than-expected natural and paid search media indexes. Also, Hyundai Motor America is dominating the paid search media share of market, but should increase natural search optimization efforts to stay competitive. All other brands should increase their efforts for both paid and natural search media. As shown in iCrossing's Search Synergy report (March 2007), paid and natural search symbiosis is important to a company's overall success. The results shown in this study suggest that the vast majority of OEMs are failing to compete in both the paid and natural search media environment.

## METHODOLOGY

### Identification of Keywords

For the automotive OEM industry, we generated a set of 102 keywords using comprehensive keyword research and the Search 500 Index: Automotive keyword list, focusing on non-branded b-to-c keywords. The keywords, competitors and URLs are not intended to be static and will be updated frequently as needed. iCrossing realizes that the keyword list is a likely source of debate, therefore, we are open to feedback and input for future analysis. For this reason, we have also created the Industry Index product, which now allows clients to customize Industry Index to meet their unique needs.

### Identification of URLs

iCrossing generated a list of automotive companies based on U.S. Automotive OEMs and their specific brands. Throughout, we refer to the OEM corporations as OEMs and their brands simply as brands. In this report, iCrossing chose to look only at U.S. OEMs on U.S. search engines, the results cannot be generalized for other nations. Their respective websites were collected, both U.S. specific and corporate URL when available, for their natural search visibility analyses. A full disclosure of the website addresses used in our analysis is included in this document. iCrossing welcomes suggestions for additions to the list in order to ensure maximum data accuracy.

### Industry Index: Natural Search Visibility Share of Market

The methodology employed in this report to determine natural search visibility share of market is based on iCrossing's unique tool - Industry Index - which combines iCrossing's Position Analysis Report (PAR) and Keyword Analysis Report (KAR). The main purpose of using this tool is to demonstrate the natural search visibility of the 19 OEMs and 47 OEM brands, and compare them on the basis of natural search visibility share of market. An appendix with a full list of keywords, and URLs considered is included below. For this report, iCrossing analyzes search engine position data from the following U.S. search engines: Google, Yahoo!, MSN, Ask and AOL. Scores are weighted based on keyword volume, search engine share of market and search engine position.

### Ad Spend Estimator: Paid Search Media Share of Market

iCrossing's proprietary Ad Spend Estimator technology combines AdGooroo data with Google AdWords data on a keyword level to estimate paid search media market share on the Google search engine only. For this study, data was collected during a six week period, and then analyzed by iCrossing's advanced analytics department. Scores take into consideration average rank, coverage, and CPC of the same automotive keywords and OEM URLs used above to calculate natural search share of market. Calculating paid search media share of market allows us to compare paid and natural search media strategies across each brand.

## MEDIA AND CONTENT INQUIRIES

### CONTENT USAGE

The content and statistics contained in the main body of this report may be used in publications and presentations provided there is attribution to iCrossing, Inc — Vertical Visibility Index: Automotive.

The complete appendixes for this report can be obtained by contacting iCrossing at [howamericasearches@icrossing.com](mailto:howamericasearches@icrossing.com) and may require acceptance of a Non-Disclosure Agreement.

### ABOUT THIS REPORT

iCrossing's Vertical Visibility Index: Automotive series is designed to provide iCrossing clients, marketers and members of the media with analysis of new developments, trends and competitive activity in search engine and interactive marketing. The report is derived from iCrossing's experience and expertise in performing search analytics and providing search marketing services for clients in the automotive and other industries.

### ABOUT ICROSSING

iCrossing is a global digital marketing company that combines talent and technology to help world-class brands find and connect with their customers. The company blends best-in-class digital marketing services - including paid and natural search marketing, Web development, social media, research and analytics - to create integrated digital marketing programs that engage consumers and drive ROI. iCrossing's client base includes such recognized brands as Epson America, Toyota, Travelocity and 40 Fortune 500 companies, including The Coca-Cola Company and Office Depot. Headquartered in Scottsdale, Arizona, the company has 620 employees in 15 offices in the U.S. and Europe.

## APPENDIX A

## AUTOMOTIVE KEYWORD PHRASES CONSIDERED (102)

alternative fuel	car online	new car
auto	car payment calculator	new car dealer
auto dealer	car price	new car price
auto incentives	car quote	new car quote
auto industry	car resale values	pickup
auto lease dealer	car retailer	pickup truck
auto loan	car review	pre-owned auto
auto loan calculator	car reviews	pre-owned automobile
auto loan refinance	car sale	pre-owned car
auto online	car search	race cars
auto quote	car show	safe auto
auto retailer	car specials	sedan
auto show	car values	semi truck
auto warranty	car warranty	smart car
automobile	cars online	sports car
automobile dealer	certified pre-owned	station wagon
automobile incentives	certified used	suv
automobile quote	cheap car	truck
automobile retailer	concept cars	truck accessory
buy a car	convertible	truck dealer
buy an auto	coupe	truck part
buy an automobile	crossover vehicle	truck part service
buy new car	electric car	truck repair
buy used car	environmentally friendly car	used auto
buying a car	extended auto warranty	used auto part
car	fast car	used car
car accessory	fuel economy	used car dealer
car dealer	fuel-efficient car	used car for sale
car deals	gas mileage	used car prices
car finance	hatchback	used truck
car incentives	hybrid car	used vehicle
car lease	luxury car	vans
car loan	mini van	vehicle
car loan calculator	muscle car	vehicle sales

APPENDIX B

FORTUNE 500 AUTOMOTIVE GROUP URLS CONSIDERED (63)

OEM	BRANDS	URLs		
General Motors Corporation	GM	www.gm.com		
	Pontiac	www.pontiac.com		
	Buick	www.buick.com		
	GMC	www.gmc.com		
	Cadillac	www.cadillac.com		
	Saturn	www.saturn.com		
	Hummer	www.hummer.com		
Ford Motor Company	Saab	www.saab.com	www.saabusa.com	
	Ford	www.ford.com	www.fordvehicles.com	www.forddirect.com
	Lincoln	www.lincoln.com		
	Mercury	www.mercuryvehicles.com		
	Volvo	www.volvocars.com	www.volvocars.com/us	
Toyota Motor Sales USA	Mazda	www.mazdausa.com	www.mazda.com	
	Toyota	www.toyota.com	www.buytoyota.com	
	Lexus	www.lexus.com		
	Scion	www.scion.com		
American Honda Motor Company	Honda	www.honda.com	automobiles.honda.com	
	Acura	www.acura.com		
Hyundai Motor America	Kia	www.kia.com		
	Hyundai	usa.hyundai-motor.com	www.hyundai-motor.com	www.hyundaiusa.com
BMW of North America	BMW	www.bmwusa.com	www.bmw.com	
	Mini	www.miniusa.com	www.mini.com	
	Rolls-Royce	www.rolls-roycemotocars.com		
Volkswagen of America	Volkswagen	www.vw.com	www.volkswagen.com	
	Audi	www.audiusa.com	www.audi.com	
	Bentley	www.bentleyusa.com	www.bentley.com	
	Lamborghini	lamborghini.com		
Mercedes-Benz USA	Mercedes	www.mbusa.com	www.mercedes-benz.com	
	Smart	www.smartusa.com		
	Maybach	www.maybach-manufaktur.com		
Nissan North America	Nissan	www.nissanusa.com		
	Infiniti	www.infiniti.com		
Chrysler LLC	Chrysler	www.chrysler.com		
	Dodge	www.dodge.com		
	Jeep	www.jeep.com		
American Suzuki Motor	Suzuki	www.suzukiauto.com		
Subaru of America	Subaru	www.subaru.com		
Mitsubishi North America	Mitsubishi	www.mitsubishicars.com		
Porsche Cars North America	Porsche	www.porsche.com/usa	www.porsche.com	
Fiat SPA	Ferrari	www.ferrariworld.com		
	Maserati	www.maserati.com		
Aston Martin	Aston Martin	www.astonmartin.com		
Isuzu Motors America	Isuzu	www.isuzu.com		
Group Lotus	Lotus	www.lotuscars.com		
Tata Motors Limited	Tata	www.tatacarsworldwide.com		
	Jaguar	www.jaguarusa.com		
	Land Rover	www.landrover.com	www.landroverusa.com	