NATIONWIDE READERSHIP SURVEY
CONDUCTED AMONG NEW CAR DEALERS
2013

Conducted by Erdos & Morgan for Automotive News
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PURPOSE, METHOD AND SCOPE

Erdos & Morgan was retained by Automotive News to conduct a survey among U.S. automotive dealers. The sample of 2,000 was drawn by a systematic random (every Nth name) selection process from a list of U.S. car dealers with $10 million or higher in sales from the files of Dun and Bradstreet (primary SIC code 5511).

The purpose of this survey was to determine readership and reading habits of automotive dealers, the "most important" publication, and the use of websites and other methods for gathering news and information about the automotive industry. Additionally, basic dealership data for 2012 on the number of vehicles sold and net revenues were collected from this national sample of automotive dealers.

Two subgroups - dealers with 2012 net sales revenue less than $35 million and dealers with 2012 net sales revenue of $35 million or greater - were statistically tested at the 95% confidence level.

Automotive publications named in this report were collected on a completely unaided basis.

On June 11, 2013 an advance letter was mailed to the 2,000 automotive dealers. On June 14, 2013, a one-page questionnaire accompanied by a cover letter on Erdos & Morgan letterhead, a one-dollar bill incentive, and a postage-paid reply envelope was sent to these 2,000 automotive dealers. Respondents could complete the survey either by mailing the questionnaire back in the postage-paid reply envelope, or online through a designated URL and unique pin.

A second survey was mailed on July 17, 2013 to non-responders with contents identical to the first mailing, including another one-dollar bill incentive. As additional encouragement, respondents who completed the survey were invited to participate in a drawing to win an Apple iPad.

Completed questionnaires were returned directly to the offices of Erdos & Morgan. At no time was Automotive News identified as the sponsor of the survey.

At the survey closing date of August 12, 2013, a total of 212 questionnaires had been received. Allowing for 53 post office returns, the net effective mailing was 1,947.

The 212 total respondents represent a 10.9% net return rate. After eliminating 32 respondents who were not current automotive dealers, a respondent base of 180 current automotive dealers was used to calculate survey results.

All tables, percentages, and other calculations in this report were prepared by Erdos & Morgan in accordance with accepted research practices.

ABOUT THE LIST

The list used for the Nationwide Readership Survey of New Car Dealers was purchased from Dun & Bradstreet Information Services, a company of the Dun & Bradstreet. The Dun & Bradstreet lists are certified by Business Publications Audit of Circulation, Inc. and are often used by publications as a source for circulation development. D&B's database consists of over 22 million publicly and privately owned U.S. companies and their key decision-makers.

D&B's lists offer selectivity by line of business (SIC), title, gender, age and size (number of employees or sales volume). SIC (Standard Industrial Classification) codes are a universal system of classifying through which one can distinguish all types of businesses. SIC codes were developed by the U.S. Government in cooperation with the private business sector.

For this research, D&B's U.S. new car dealer file (primary SIC code 5511) was selected. On an Nth name basis, 2,000 names were selected from those dealers with a sales volume of $10 million or more. The sample list included the Chief Executive Officer at dealerships, e.g., president, owner, partner, etc., and included name, title, address, city, state and ZIP code.

A duplication elimination process including telephone number was implemented to weed out redundancy. Lists were provided directly from Dun & Bradstreet to the research company of Erdos & Morgan.

ABOUT ERDOS & MORGAN

Erdos & Morgan is readily identified as a leader in business-to-business research. With offices in New York and Boston, they are one of the premier international market and media research companies based in the United States.

Erdos & Morgan is a 66-year-old full-service market research company offering a broad range of services to corporate America, the media, and advertising agencies. Founded in 1947 by Paul L. Erdos and Arthur J. Morgan, their years of experience provide unparalleled familiarity with the types of questions and analyses focused on business-to-business research.

Studies include syndicated research, such as Opinion Leaders, Purchase Influence in American Business, the Worldwide Professional Investment Community, Business & Leisure Travel. Custom research includes panels, product research, concept/ad testing, sales and market positioning, customer satisfaction, corporate image/perception, subscriber, readership/editorial, circulation, direct marketing, and tracking studies. These are completed utilizing both quantitative and qualitative techniques including mail, telephone, personal/one-on-one, online, on-site, focus groups, and other statistically sound methods.
The following were all open-ended questions where respondents were asked to write in their answers.

**RECEIVERSHIP**

**QUESTION:**
What automotive publications do you receive addressed to you, routed to you, or by any other means?

**ANALYSIS:**
*Automotive News* is, by more than a 2:1 margin, the most widely received trade publication.

An overwhelming number of dealers with more than $35 million in annual sales receive *Automotive News*.

![Bar chart showing percentage of respondents who receive various publications](chart1.png)

<table>
<thead>
<tr>
<th>Publication</th>
<th>Total Respondents (180)</th>
<th>Dealers with over $35 million in annual sales</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Automotive News</em></td>
<td>91%</td>
<td>86%</td>
</tr>
<tr>
<td><em>Ward’s Dealer Business</em></td>
<td>35%</td>
<td>34%</td>
</tr>
<tr>
<td><em>Dealer Magazine</em></td>
<td>34%</td>
<td>33%</td>
</tr>
</tbody>
</table>

**READERSHIP**

**QUESTION:**
How many of the last four issues of each of these automotive publications have you read or looked through?

**Percentage of respondents who read 1 or more of the last 4 issues:**

![Bar chart showing percentage of respondents who read various publications](chart2.png)

<table>
<thead>
<tr>
<th>Publication</th>
<th>Total Respondents (180)</th>
<th>Dealers with over $35 million in annual sales</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Automotive News</em></td>
<td>88%</td>
<td>82%</td>
</tr>
<tr>
<td><em>Ward’s Dealer Business</em></td>
<td>32%</td>
<td>31%</td>
</tr>
<tr>
<td><em>Dealer Magazine</em></td>
<td>33%</td>
<td>27%</td>
</tr>
</tbody>
</table>

**ANALYSIS:**

Eight out of ten dealers read one or more of the last four issues of *Automotive News*.

Nine out of ten dealers with more than $35 million in annual sales read one or more of the last four issues of *Automotive News*.
Historical Erdos & Morgan research confirms Automotive News remains the leader in receivership, readership and importance among new car dealers.
ONLINE

QUESTION:
Which websites do you consider to be sources of news and information about the automotive industry?

- **33%** autonews.com
- **18%** nada.org

QUESTION:
Which website do you consider your primary online source of news and information about the automotive industry?

- **28%** autonews.com
- **12%** nada.org

QUESTION:
What other ways do you gather news and information about the automotive industry?

- **32%** Email Newsletters
- **12%** Webinars
- **11%** Live Conferences and Events
- **8%** Social Media Sites*

* Facebook, Twitter, LinkedIn, etc

Percentages reflect those who indicated they “Frequently” gather news and information from the sources indicated.

Total respondents (180)
NUMBER OF FRANCHISES CURRENTLY OWNED OR MANAGED

Dealers who responded to the survey own or manage an average of 3.5 franchises.

NUMBER OF NEW/USED VEHICLES SOLD BY DEALERSHIP

Dealers sold an average of 1,543 new and 1,102 used vehicles during 2012.

<table>
<thead>
<tr>
<th># SOLD IN 2010</th>
<th>NEW %</th>
<th>USED %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fewer than 200</td>
<td>9%</td>
<td>6%</td>
</tr>
<tr>
<td>200 – 299</td>
<td>7%</td>
<td>6%</td>
</tr>
<tr>
<td>300 – 399</td>
<td>9%</td>
<td>12%</td>
</tr>
<tr>
<td>400 – 499</td>
<td>11%</td>
<td>5%</td>
</tr>
<tr>
<td>500 – 599</td>
<td>6%</td>
<td>10%</td>
</tr>
<tr>
<td>600 – 699</td>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td>700 – 799</td>
<td>3%</td>
<td>7%</td>
</tr>
<tr>
<td>800 – 899</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>900 – 999</td>
<td>4%</td>
<td>6%</td>
</tr>
<tr>
<td>1,000 – 1,199</td>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td>1,200 – 1,399</td>
<td>3%</td>
<td>4%</td>
</tr>
<tr>
<td>1,400 – 1,599</td>
<td>2%</td>
<td>3%</td>
</tr>
<tr>
<td>1,600 – 1,999</td>
<td>4%</td>
<td>2%</td>
</tr>
<tr>
<td>2,000 – 2,499</td>
<td>3%</td>
<td>2%</td>
</tr>
<tr>
<td>2,500 – 2,999</td>
<td>.6%</td>
<td>1%</td>
</tr>
<tr>
<td>3,000 – 3,999</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>4,000 – 4,999</td>
<td>1%</td>
<td>3%</td>
</tr>
<tr>
<td>5,000 or more</td>
<td>9%</td>
<td>3%</td>
</tr>
<tr>
<td>No answer</td>
<td>7%</td>
<td>7%</td>
</tr>
</tbody>
</table>

Average (in millions): 47.9

Base: Total respondents (180)
Totals do not add to 100% due to rounding.