

The Scarborough Research/RAB Automotive Study

A Report for the Radio Industry on Automotive Patterns in the U.S.
Released in Conjunction with the RAB Annual Conference



2007



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INTRODUCTION



My husband and I are having our first child, so we plan to buy a minivan or SUV next to accommodate our growing family.



Selling cars today is a tough business. I am looking for local media outlets who will partner with me to help grow my business.



I tune into the news when I drive to work in the morning. I like to have my headlines, and the traffic reports help me choose my route.

SELL THE AUTOMOTIVE CATEGORY WITH GREATER INTELLIGENCE USING THE SCARBOROUGH RESEARCH/RAB AUTOMOTIVE STUDY AS YOUR TOOL.

Through the combination of Scarborough data on shopping habits, media patterns, lifestyles and demographics of American consumers with Radio Advertising Bureau (RAB) information on vehicle sales, this report is your tool to sell with greater intelligence in the automotive category.

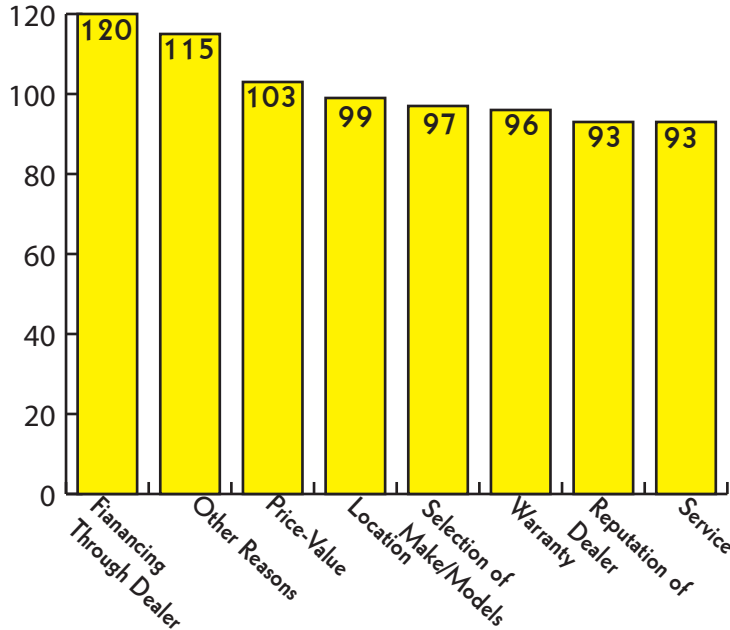
The Scarborough Research/RAB Automotive Study profiles the top-five selling domestic vehicle brands (Ford, Chevrolet, Dodge, Chrysler, Jeep) and the top-five selling foreign vehicle brands (Toyota, Honda, Nissan, Hyundai, and Lexus). Additionally, it has a spotlight section on BMW. With their recent announcement to add high-definition radio receivers as a factory installation option, BMW has garnered special attention in the radio industry. This report profiles the BMW driver, focusing on their interest in new personal technologies (i.e. MP3 players, PDAs, etc.) and new entertainment media (i.e. HDTV, DVRs, VOD, etc.).

Use this report as a basis for your automotive pitches - from dealerships and manufacturers to repair and service providers. Draw on these insights to sell more smartly, and become a valued marketing consultant to your clients.

The Scarborough Research/RAB Automotive Study is also available online at www.scarborough.com/freestudies.php and www.rab.com. Contacts for more information are available at the end of this report (page 27).

Ford Owners Profile

Reasons Why Ford Owners Selected a Dealership for Their Last New Vehicle Purchase/Lease (Index, 100=National Average)



Miles Traveled One-Way to Buy/Lease Last New Vehicle Among Ford Owners

Less than 10 Miles	20%
10-19 Miles	15%
20-29 Miles	10%
30 or Miles or More	14%

Ford Owners
 Median Age: 44
 Median Annual Household Income: \$53,933

Percentage of Annual Ford Sales by Month: A Three Year Trend

Automotive News Data Center 2004-2006

Year	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	Total
2004	6.9%	7.8%	9.4%	8.8%	9.7%	8.5%	8.4%	8.1%	8.5%	8.0%	7.0%	8.8%	2,766,169
2005	6.2%	7.9%	9.5%	9.0%	9.1%	9.2%	11.7%	9.2%	7.2%	6.3%	6.3%	8.4%	2,634,041
2006	7.0%	8.4%	9.9%	8.9%	9.7%	9.3%	8.2%	8.8%	8.4%	7.5%	6.1%	7.8%	2,415,059

Demographics

	Total U.S. Adults	Ford Owners	Index
Men	50%	51%	106
Women	50%	49%	95
Married	57%	63%	111
Widowed/Legally Separated/Divorced	18%	14%	77
Never Married (Single)	25%	23%	91

Ford Owners are 11% more likely to be married than the average consumer.

Ford Owners are defined as consumers who own or lease a Ford vehicle in their household

Source: Scarborough Research USA+

Release 1 2006

Ford Owners Profile

Top 10 Formats for Ford Owners

All formats represent opportunity for Ford to expand its market share.

Radio Format Profiles	Total U.S Adults	Ford Owners	Index
Country	21%	24%	119
News/Talk/Info	20%	18%	94
Adult Contemporary	15%	15%	100
Pop CHR	13%	14%	104
Classic Rock	11%	13%	115
Oldies	8%	9%	106
Rythmic CHR	9%	9%	99
Hot AC	9%	9%	100
Alternative	6%	7%	103
Urban Contemporary	7%	6%	90

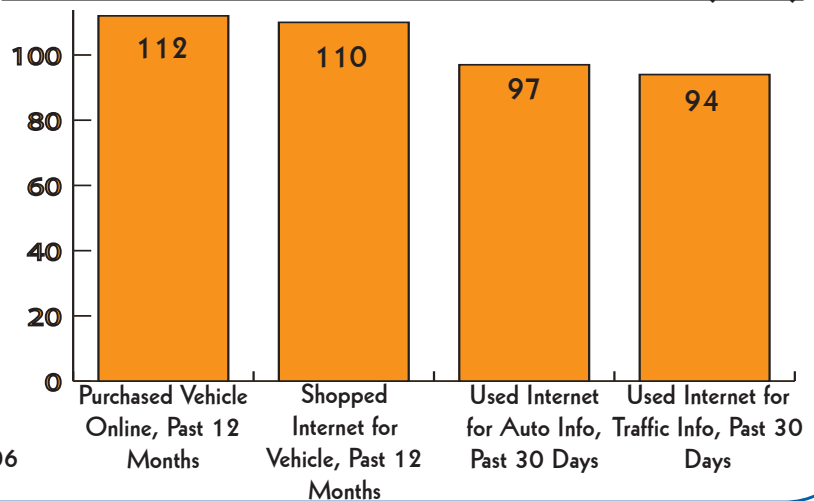
Vehicles Purchased/Leased by Household

Type of Vehicle	Total U.S. Adults	Ford Owners	Index
Any New Vehicle	53%	56%	106
Any Used Vehicle	64%	78%	122
Any Leased Vehicle	5%	5%	94

9% of Ford Owners listen to Oldies. They are 6% more likely than the national average to do so.

24% of Ford Owners cite themselves as the principal decision maker for the last new vehicle purchase/lease; 21% say the decision was "shared equally" in their household.

Ford Owners Are 12% More Likely Than All Consumers to Have Purchased A Vehicle Online in the Past 12 Months (Index)

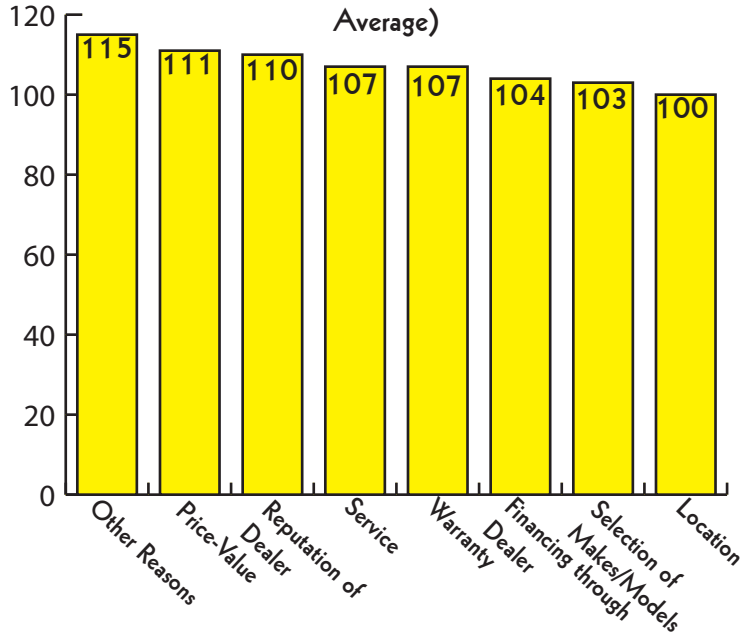


Ford Owners are defined as consumers who own or lease a Ford vehicle in their household.

Source: Scarborough Research USA+, Release 1 2006

Chevrolet Owners Profile

Reasons Why Chevrolet Owners Selected a Dealership for Their Last New Vehicle Purchase/Lease (Index, 100=National Average)



Miles Traveled One-Way to Buy/Lease Last New Vehicle Among Chevrolet Owners

Less than 10 Miles	22%
10-19 Miles	15%
20-29 Miles	10%
30 or Miles or More	13%

Chevrolet Owners
 Median Age: 44
 Median Annual Household Income: \$51,324

Percentage of Annual Chevrolet Sales by Month: A Three Year Trend

Automotive News Data Center 2004-2006

Year	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	Total
2004	6.1%	7.2%	8.4%	8.5%	9.3%	8.0%	9.7%	8.8%	10.3%	7.5%	6.7%	9.5%	2,747,368
2005	6.5%	6.9%	9.7%	8.6%	8.8%	12.3%	11.5%	7.5%	7.7%	5.7%	6.2%	8.6%	2,651,124
2006	7.2%	7.3%	9.1%	8.7%	8.6%	10.1%	10.1%	8.7%	7.9%	7.1%	7.1%	8.0%	2,396,532

Demographics

	Total U.S. Adults	Chevrolet Owners	Index
Men	50%	52%	108
Women	50%	48%	93
Married	57%	62%	109
Widowed/Legally Separated/Divorced	18%	14%	80
Never Married (Single)	25%	23%	93

Chevrolet Owners are 9% more likely to be married than the average consumer.

Chevrolet Owners are defined as consumers who own or lease a Chevrolet vehicle in their household
 Source: Scarborough Research USA+
 Release 1 2006

Chevrolet Owners Profile

Top 10 Formats for Chevrolet Owners

All formats represent opportunity for Chevrolet to expand its market share.

Radio Format Profiles	Total U.S Adults	Chevy Owners	Index
Country	21%	26%	126
News/Talk/Info	20%	17%	88
Pop CHR	13%	15%	109
Adult Contemporary	15%	14%	93
Classic Rock	11%	13%	119
Hot AC	9%	9%	104
Oldies	8%	9%	106
Rhythmic CHR	9%	8%	89
Urban Contemporary	7%	7%	96
Alternative	6%	6%	101

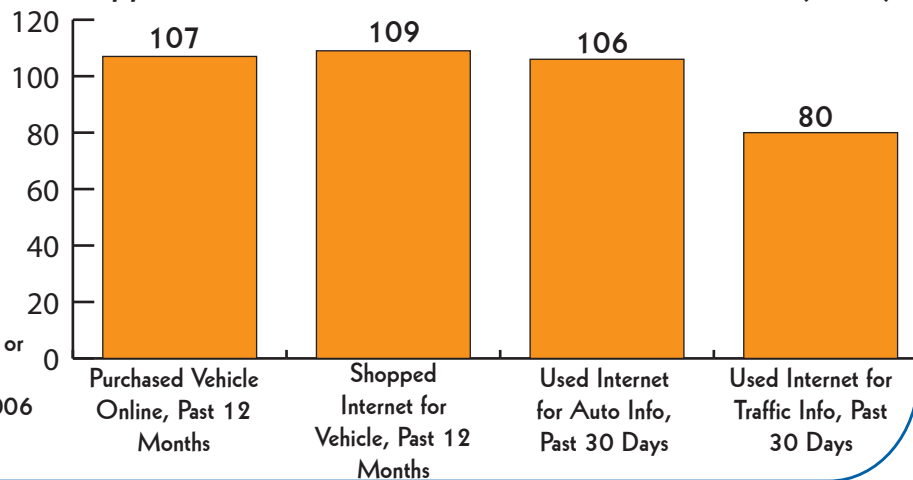
Vehicles Purchased/Leased by Household

Type of Vehicle	Total U.S. Adults	Chevrolet Owners	Index
Any New Vehicle	53%	57%	109
Any Used Vehicle	64%	78%	122
Any Leased Vehicle	5%	5%	97

13% of Chevrolet owners listen to Classic Rock. They are 19% more likely than all consumers nationally to do so.

25% of Chevrolet Owners cite themselves as the principal decision maker for the last new vehicle purchase/lease; 22% say the decision was "shared equally" in their household.

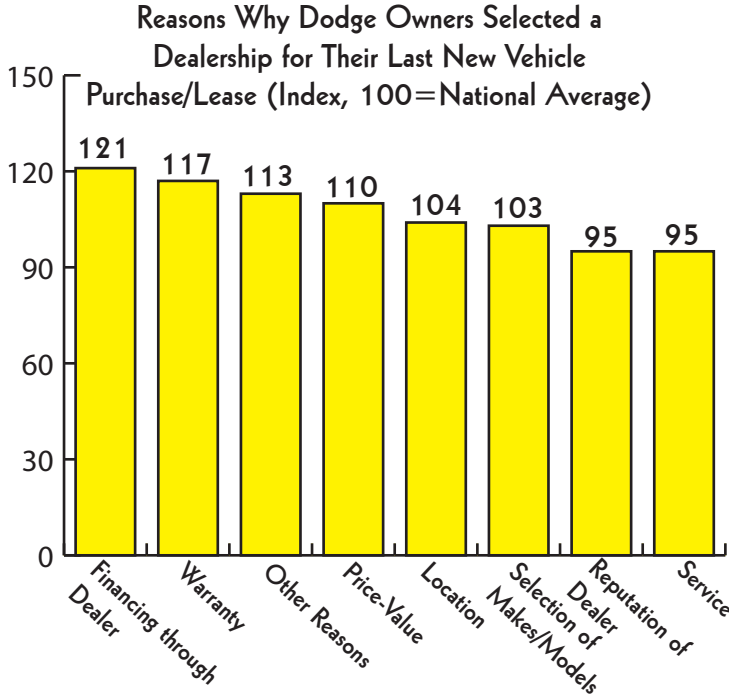
Chevrolet Owners Are 9% More Likely Than All Consumers to Have Shopped for A Vehicle Online in the Past 12 Months (Index)



Chevrolet Owners are defined as consumers who own or lease a Chevrolet vehicle in their household.
Source: Scarborough Research USA+, Release 1 2006



Dodge Owners Profile



Miles Traveled One-Way to Buy/Lease Last New Vehicle Among Dodge Owners

Less than 10 Miles	20%
10-19 Miles	16%
20-29 Miles	11%
30 or Miles or More	14%

Dodge Owners
 Median Age: 43
 Median Annual Household Income: \$55,518

Percentage of Annual Dodge Sales by Month: A Three Year Trend

Automotive News Data Center 2004-2006

Year	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	Total
2004	6.7%	7.9%	9.1%	8.3%	10.2%	10.2%	8.7%	8.1%	7.7%	7.6%	7.0%	8.5%	1,189,894
2005	6.7%	8.2%	9.5%	8.9%	9.5%	9.2%	10.4%	8.7%	8.2%	6.8%	6.8%	7.1%	1,179,008
2006	7.2%	8.9%	10.5%	9.9%	9.3%	9.0%	7.1%	8.3%	7.4%	7.2%	7.1%	8.2%	1,077,579

Demographics

	Total U.S. Adults	Dodge Owners	Index
Men	50%	53%	109
Women	50%	47%	91
Married	57%	66%	116
Widowed/Legally Separated/Divorced	18%	13%	70
Never Married (Single)	25%	21%	85

Dodge Owners are 16% more likely to be married than the average consumer.

Dodge Owners are defined as consumers who own or lease a Dodge vehicle in their household
 Source: Scarborough Research USA+
 Release 1 2006

Dodge Owners Profile

Top 10 Formats for Dodge Owners

All formats represent opportunity for Dodge to expand its market share.

Radio Format Profiles	Total U.S Adults	Dodge Owners	Index
Country	21%	26%	128
News/Talk/Info	20%	18%	92
Pop CHR	13%	15%	113
Adult Contemporary	15%	14%	96
Classic Rock	11%	12%	110
Hot AC	9%	9%	106
Oldies	8%	9%	103
Rhythmic CHR	9%	8%	90
Alternative	6%	7%	105
Urban Contemporary	7%	7%	92

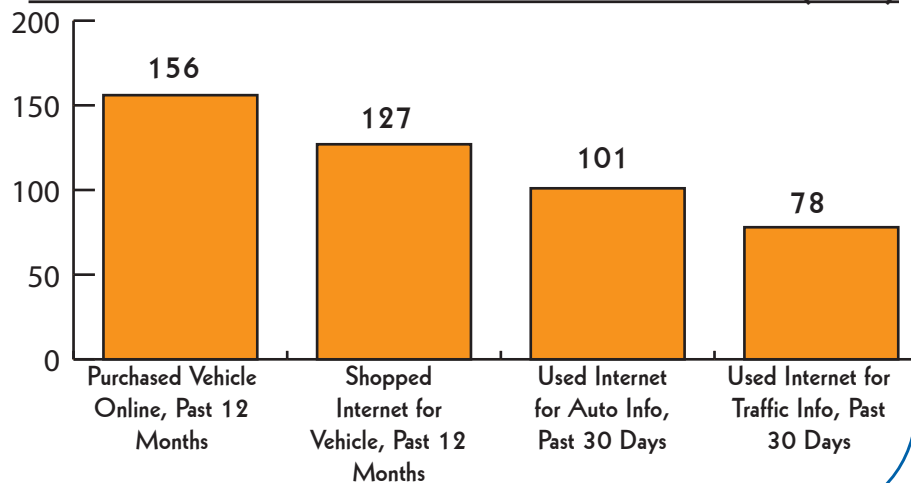
Vehicles Purchased/Leased by Household

Type of Vehicle	Total U.S. Adults	Dodge Owners	Index
Any New Vehicle	53%	57%	109
Any Used Vehicle	64%	79%	123
Any Leased Vehicle	5%	5%	89

26% of Dodge Owners listen to Country. They are 28% more likely than the national average to do so.

24% of Dodge Owners cite themselves as the principal decision maker for the last new vehicle purchase/lease; 24% say the decision was "shared equally" in their household.

Dodge Owners Are 56% More Likely Than All Consumers to Have Purchased a Vehicle Online in the Past 12 Months (Index)

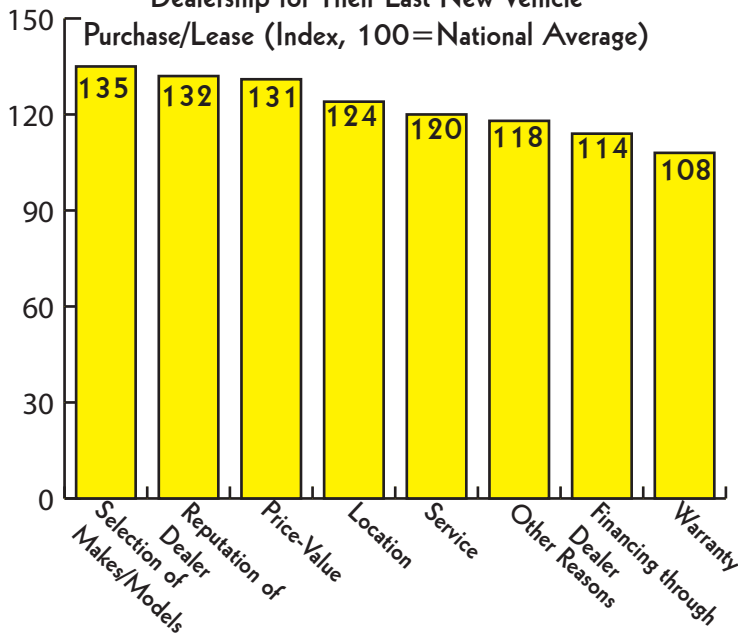


Dodge Owners are defined as consumers who own or lease a Dodge vehicle in their household.

Source: Scarborough Research USA+, Release 1 2006

Chrysler Owners Profile

Reasons Why Chrysler Owners Selected a Dealership for Their Last New Vehicle Purchase/Lease (Index, 100=National Average)



Miles Traveled One-Way to Buy/Lease Last New Vehicle Among Chrysler Owners

Less than 10 Miles	27%
10-19 Miles	18%
20-29 Miles	10%
30 or Miles or More	13%

Chrysler Owners:
Median Age: 47
Median Annual Household Income: \$61,089

Percentage of Annual Chrysler Sales by Month: A Three Year Trend

Automotive News Data Center 2004-2006

Year	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	Total
2004	5.8%	6.7%	8.5%	8.7%	9.7%	9.2%	8.2%	8.1%	8.1%	8.2%	8.6%	10.2%	588,891
2005	6.4%	8.3%	9.3%	9.4%	9.5%	10.1%	9.4%	6.8%	7.0%	8.0%	7.7%	8.0%	649,293
2006	8.0%	9.1%	9.8%	8.6%	9.2%	8.6%	6.3%	7.8%	7.8%	6.9%	8.7%	9.2%	604,874

Demographics

	Total U.S. Adults	Chrysler Owners	Index
Men	50%	49%	101
Women	50%	51%	99
Married	57%	68%	120
Widowed/Legally Separated/Divorced	18%	12%	67
Never Married (Single)	25%	20%	79

Chrysler Owners are 20% more likely to be married than the average consumer.

Chrysler Owners are defined as consumers who own or lease a Chrysler vehicle in their household
 Source: Scarborough Research USA+
 Release 1 2006

Chrysler Owners Profile

Top 10 Formats for Chrysler Owners

All formats represent opportunity for Chrysler to expand its market share.

Radio Format Profiles	Total U.S. Adults	Chrysler Owners	Index
News/Talk/Info	20%	23%	115
Country	21%	22%	106
Adult Contemporary	15%	16%	110
Pop CHR	13%	13%	98
Classic Rock	11%	11%	97
Oldies	8%	10%	123
Hot AC	9%	9%	103
Rhythmic CHR	9%	7%	84
Urban Contemporary	7%	6%	87
Alternative	6%	6%	95

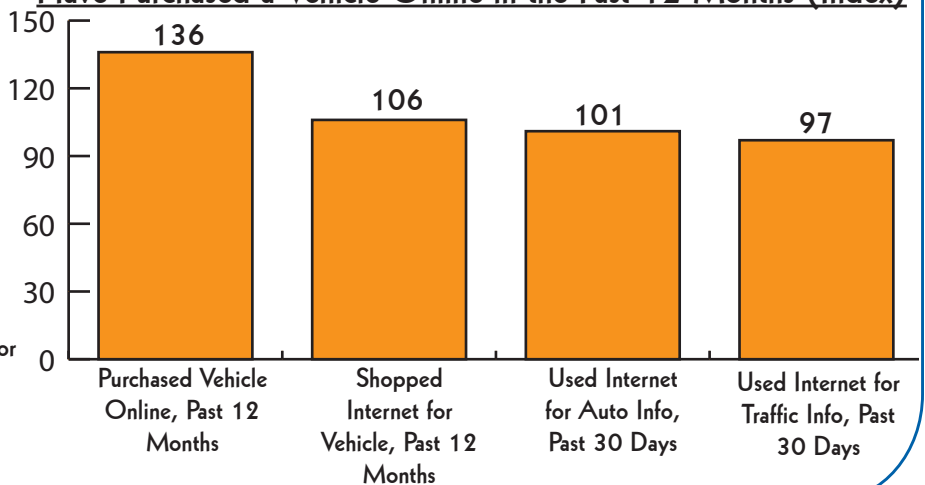
Vehicles Purchased/Leased by Household

Type of Vehicle	Total U.S. Adults	Chrysler Owners	Index
Any New Vehicle	53%	64%	121
Any Used Vehicle	64%	70%	110
Any Leased Vehicle	5%	8%	148

Almost one-quarter (23%) of Chrysler owners listen to News/Talk/Info

25% of Chrysler owners cite themselves as the principal decision maker for the last new vehicle purchase/lease; 27% say the decision was "shared equally" in their household.

Chrysler Owners Are 36% More Likely Than All Consumers to Have Purchased a Vehicle Online in the Past 12 Months (Index)

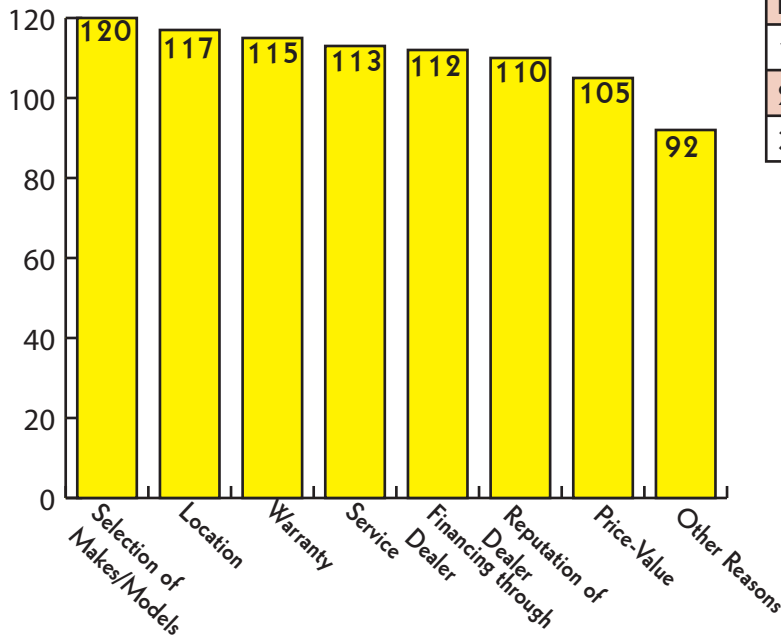


Chrysler Owners are defined as consumers who own or lease a Chrysler vehicle in their household.
 Source: Scarborough Research USA+, Release 1 2006



Jeep Owners Profile

Reasons Why Jeep Owners Selected a Dealership for Their Last New Vehicle Purchase/Lease (Index, 100=National Average)



Miles Traveled One-Way to Buy/Lease Last New Vehicle Among Jeep Owners

Less than 10 Miles	24%
10-19 Miles	17%
20-29 Miles	10%
30 or Miles or More	14%

Jeep Owners
 Median Age: 44
 Median Annual Household Income: \$66,724

Percentage of Annual Jeep Sales by Month: A Three Year Trend
 Automotive News Data Center 2004-2006

Year	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	Total
2004	7.8%	9.1%	9.4%	9.1%	9.8%	7.8%	8.9%	7.9%	7.0%	7.3%	7.2%	8.8%	427,239
2005	5.8%	7.5%	8.5%	8.5%	8.5%	9.7%	11.8%	8.5%	7.0%	6.8%	6.3%	11.2%	476,532
2006	6.5%	8.6%	9.5%	6.9%	7.7%	8.1%	7.8%	9.2%	9.1%	8.8%	7.8%	10.0%	460,052

Demographics

	Total U.S. Adults	Jeep Owners	Index
Men	50%	53%	109
Women	50%	47%	91
Married	57%	66%	116
Widowed/Legally Separated/Divorced	18%	11%	64
Never Married (Single)	25%	23%	90

Jeep Owners are 16% more likely to be married than the average consumer.

Jeep Owners are defined as consumers who own or lease a Jeep vehicle in their household
 Source: Scarborough Research USA+
 Release 1 2006

Jeep Owners Profile

Top 10 Formats for Jeep Owners

All formats represent opportunity for Jeep to expand its market share.

Radio Format Profiles	Total U.S Adults	Jeep Owners	Index
Country	21%	23%	112
News/Talk/Information	20%	22%	109
Adult Contemporary	15%	16%	107
Pop CHR	13%	14%	106
Classic Rock	11%	13%	121
Hot AC	9%	10%	117
Oldies	8%	9%	114
Rhythmic CHR	9%	8%	94
All Sports	6%	7%	126
Alternative	6%	7%	112

Vehicles Purchased/Leased by Household

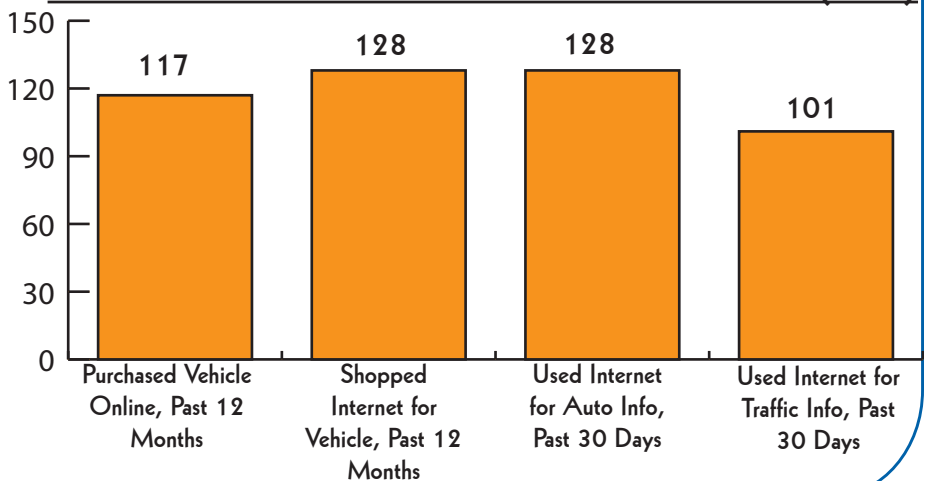
Type of Vehicle	Total U.S. Adults	Jeep Owners	Index
Any New Vehicle	53%	59%	112
Any Used Vehicle	64%	78%	121
Any Leased Vehicle	5%	8%	159

Country is the number one radio format for Jeep owners, with 23% tuning in.

26% of Jeep Owners cite themselves as the principal decision maker for the last new vehicle purchase/lease; 24% say the decision was "shared equally" in their household.

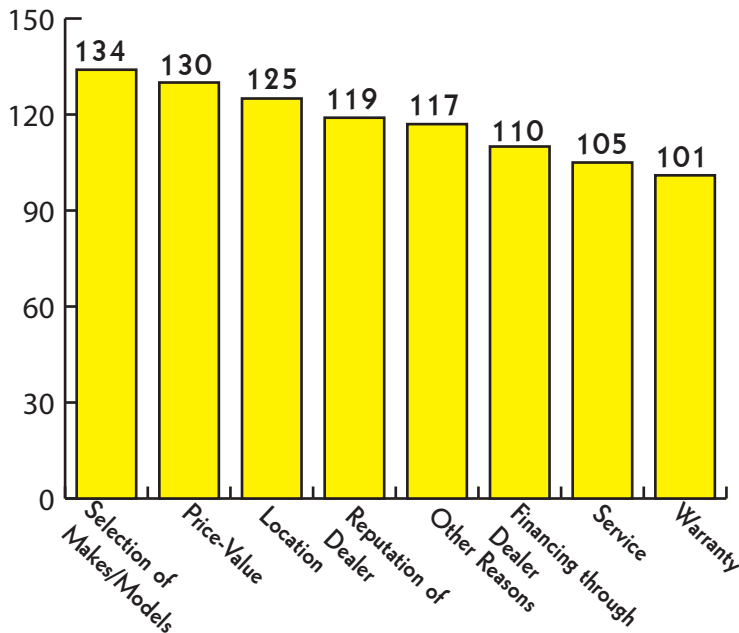
Jeep Owners are defined as consumers who own or lease a Jeep vehicle in their household.
 Source: Scarborough Research USA+, Release 1 2006

Jeep Owners Are 17% More Likely Than All Consumers to Have Purchased a Vehicle Online in the Past 12 Months (Index)



Toyota Owners Profile

Reasons Why Toyota Owners Selected a Dealership for Their Last New Vehicle Purchase/Lease (Index, 100=National Average)



Miles Traveled One-Way to Buy/Lease Last New Vehicle Among Toyota Owners

Less than 10 Miles	27%
10-19 Miles	18%
20-29 Miles	11%
30 or Miles or More	14%

Toyota Owners
 Median Age: 44
 Median Annual Household Income: \$62,585

Percentage of Annual Toyota Sales by Month: A Three Year Trend
 Automotive News Data Center 2004-2006

Year	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	Total
2004	7.3%	7.3%	8.6%	8.2%	10.2%	8.3%	9.6%	8.5%	7.8%	8.2%	7.3%	8.7%	1,672,863
2005	6.3%	7.4%	9.1%	9.4%	9.0%	8.7%	9.7%	9.0%	7.9%	7.6%	7.3%	8.6%	1,800,916
2006	6.4%	6.6%	8.6%	8.8%	9.2%	8.8%	9.6%	9.3%	8.8%	7.5%	7.7%	8.8%	2,047,057

Demographics

	Total U.S. Adults	Toyota Owners	Index
Men	50%	48%	98
Women	50%	52%	102
Married	57%	62%	108
Widowed/Legally Separated/Divorced	18%	14%	79
Never Married (Single)	25%	24%	96

Toyota Owners are 8% more likely to be married than the average consumer.

Toyota Owners are defined as consumers who own or lease a Toyota vehicle in their household
 Source: Scarborough Research USA+
 Release 1 2006

Toyota Owners Profile

Top 10 Formats for Toyota Owners

All formats represent opportunity for Toyota to expand its market share.

Radio Format Profiles	Total U.S Adults	Toyota Owners	Index
News/Talk/Information	20%	23%	116
Country	21%	19%	90
Adult Contemporary	15%	18%	117
Pop CHR	13%	13%	99
Classic Rock	11%	12%	104
Rhythmic CHR	9%	10%	119
Hot AC	9%	10%	111
Oldies	8%	9%	103
Alternative	6%	8%	125
All Sports	6%	7%	127

Vehicles Purchased/Leased by Household

Type of Vehicle	Total U.S. Adults	Toyota Owners	Index
Any New Vehicle	53%	67%	127
Any Used Vehicle	64%	67%	105
Any Leased Vehicle	5%	6%	117

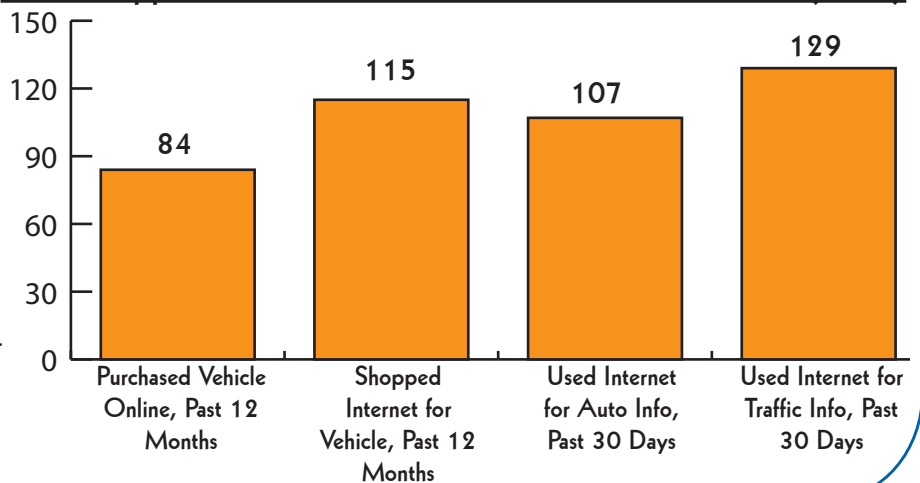
News/Talk/Info is the number one radio format for Toyota owners, with 23% tuning in.

29% of Toyota Owners cite themselves as the principal decision maker for the last new vehicle purchase/lease; 24% say the decision was "shared equally" in their household.

Toyota Owners are defined as consumers who own or lease a Toyota vehicle in their household.

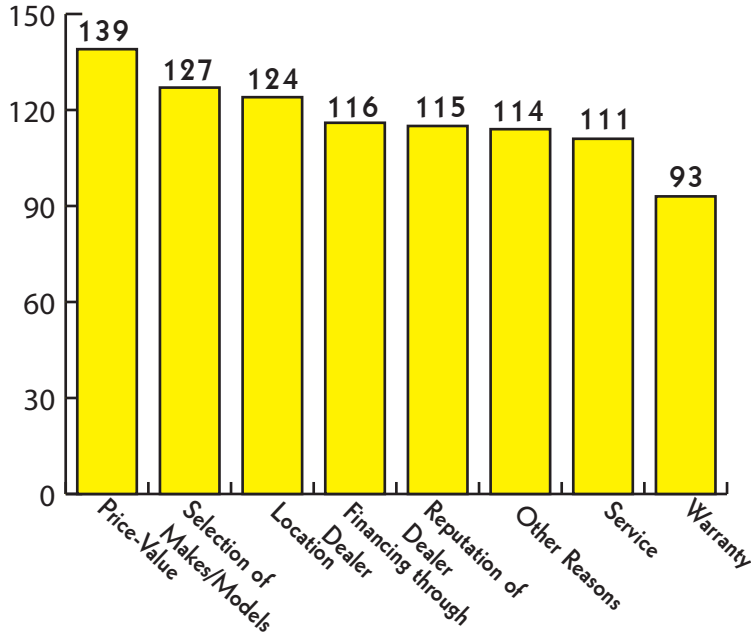
Source: Scarborough Research USA+, Release 1 2006

Toyota Owners Are 15% More Likely Than All Consumers to Have Shopped for a Vehicle Online in the Past 12 Months (Index)



Honda Owners Profile

Reasons Why Honda Owners Selected a Dealership for Their Last New Vehicle Purchase/Lease (Index, 100=National Average)



Miles Traveled One-Way to Buy/Lease Last New Vehicle Among Honda Owners

Less than 10 Miles	26%
10-19 Miles	19%
20-29 Miles	12%
30 or Miles or More	14%

Honda Owners
 Median Age: 42
 Median Annual Household Income: \$66,169

Percentage of Annual Honda Sales by Month: A Three Year Trend

Automotive News Data Center 2004-2006

Year	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	Total
2004	6.5%	7.6%	8.2%	8.2%	10.4%	8.4%	9.4%	9.2%	7.7%	7.8%	6.7%	9.8%	1,195,479
2005	5.4%	6.5%	8.8%	9.3%	8.3%	8.6%	9.9%	10.9%	8.3%	7.5%	7.3%	9.1%	1,252,862
2006	6.5%	7.1%	8.5%	9.2%	9.6%	8.5%	10.2%	10.2%	7.6%	7.2%	6.8%	8.6%	1,308,135

Demographics

	Total U.S. Adults	Honda Owners	Index
Men	50%	50%	102
Women	50%	50%	98
Married	57%	60%	106
Widowed/Legally Separated/Divorced	18%	13%	72
Never Married (Single)	25%	27%	107

More than one-quarter (27%) of Honda owners are single.

Honda Owners are defined as consumers who own or lease a Honda vehicle in their household
 Source: Scarborough Research USA+
 Release 1 2006

Honda Owners Profile

Top 10 Formats for Honda Owners

All formats represent opportunity for Honda to expand its market share.

Radio Format Profiles	Total U.S Adults	Honda Owners	Index
News/Talk/Information	20%	23%	116
Country	21%	18%	87
Adult Contemporary	15%	17%	115
Pop CHR	13%	15%	116
Classic Rock	11%	12%	105
Rhythmic CHR	9%	11%	128
Hot AC	9%	11%	125
Alternative	6%	9%	138
Oldies	8%	9%	105
All Sports	6%	8%	133

Vehicles Purchased/Leased by Household

Type of Vehicle	Total U.S. Adults	Honda Owners	Index
Any New Vehicle	53%	67%	128
Any Used Vehicle	64%	65%	102
Any Leased Vehicle	5%	8%	152

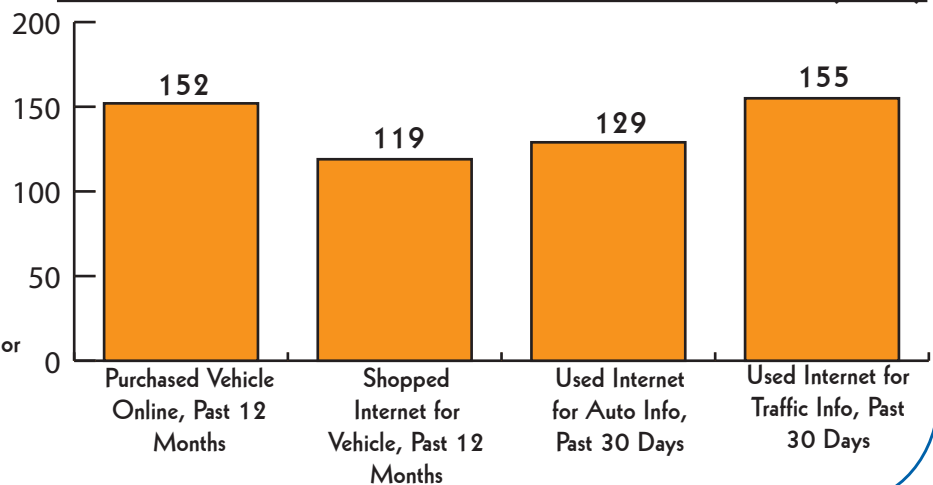
News/Talk/Info is the number one radio format for Honda owners, with 23% tuning in.

31% of Honda Owners cite themselves as the principal decision maker for the last new vehicle purchase/lease; 25% say the decision was "shared equally" in their household.

Honda Owners are defined as consumers who own or lease a Honda vehicle in their household.

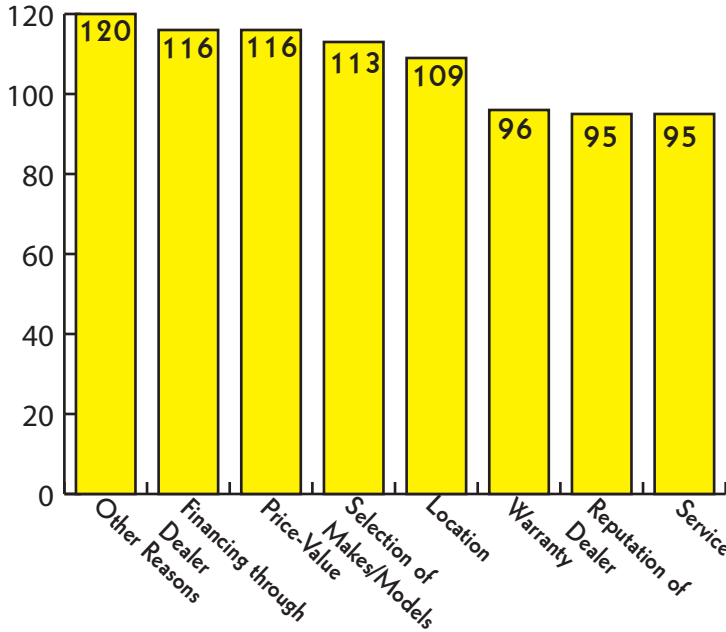
Source: Scarborough Research USA+, Release 1 2006

Honda Owners Are 52% More Likely Than All Consumers to Have Purchased a Vehicle Online in the Past 12 Months (Index)



Nissan Owners Profile

Reasons Why Nissan Owners Selected a Dealership for Their Last New Vehicle Purchase/Lease (Index, 100=National Average)



Miles Traveled One-Way to Buy/Lease Last New Vehicle Among Nissan Owners

Less than 10 Miles	24%
10-19 Miles	17%
20-29 Miles	10%
30 or Miles or More	14%

Nissan Owners
 Median Age: 41
 Median Annual Household Income: \$60,840

Percentage of Annual Nissan Sales by Month: A Three Year Trend

Automotive News Data Center 2004-2006

Year	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	Total
2004	7.3%	7.6%	9.1%	7.0%	9.0%	8.0%	9.5%	8.1%	8.2%	8.8%	8.0%	9.4%	855,002
2005	7.2%	7.7%	9.8%	8.5%	8.8%	8.6%	10.0%	8.5%	8.8%	6.6%	7.1%	8.3%	940,268
2006	7.6%	8.4%	10.1%	8.6%	8.6%	7.3%	8.4%	9.0%	8.7%	7.3%	7.3%	8.8%	898,103

Demographics

	Total U.S. Adults	Nissan Owners	Index
Men	50%	51%	105
Women	50%	49%	95
Married	57%	62%	108
Widowed/Legally Separated/Divorced	18%	13%	72
Never Married (Single)	25%	26%	102

62% of Nissan owners are married.

Nissan Owners are defined as consumers who own or lease a Nissan vehicle in their household
 Source: Scarborough Research USA+
 Release 1 2006

Nissan Owners Profile

Top 10 Formats for Nissan Owners

All formats represent opportunity for Nissan to expand its market share.

Radio Format Profiles	Total U.S. Adults	Nissan Owners	Index
News/Talk/Information	20%	19%	99
Country	21%	19%	90
Adult Contemporary	15%	17%	114
Pop CHR	13%	17%	129
Classic Rock	11%	13%	114
Rhythmic CHR	9%	12%	136
Hot AC	9%	10%	112
Alternative	6%	9%	135
Urban Contemporary	7%	8%	116
Oldies	8%	8%	96

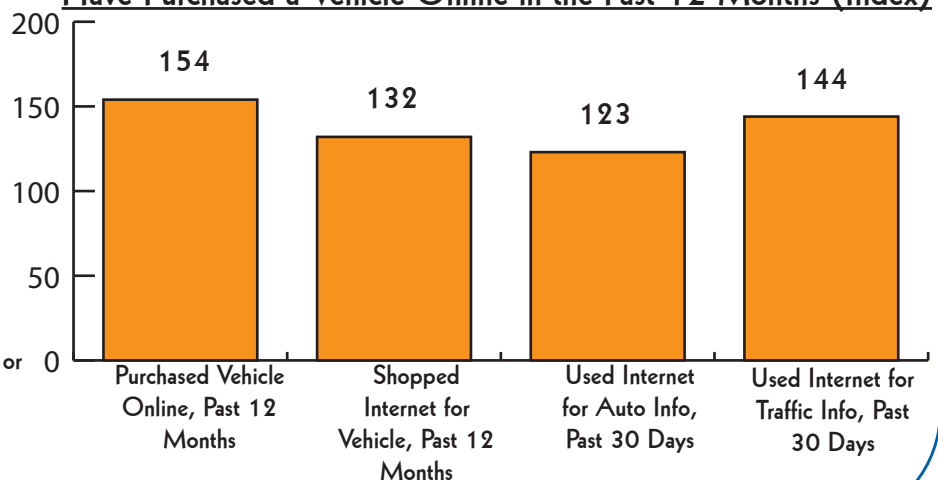
Vehicles Purchased/Leased by Household

Type of Vehicle	Total U.S. Adults	Nissan Owners	Index
Any New Vehicle	53%	61%	117
Any Used Vehicle	64%	73%	114
Any Leased Vehicle	5%	6%	119

Nissan owners are 29% more likely than the national average to listen to the Pop CHR radio format.

28% of Nissan Owners cite themselves as the principal decision maker for the last new vehicle purchase/lease; 22% say the decision was "shared equally" in their household.

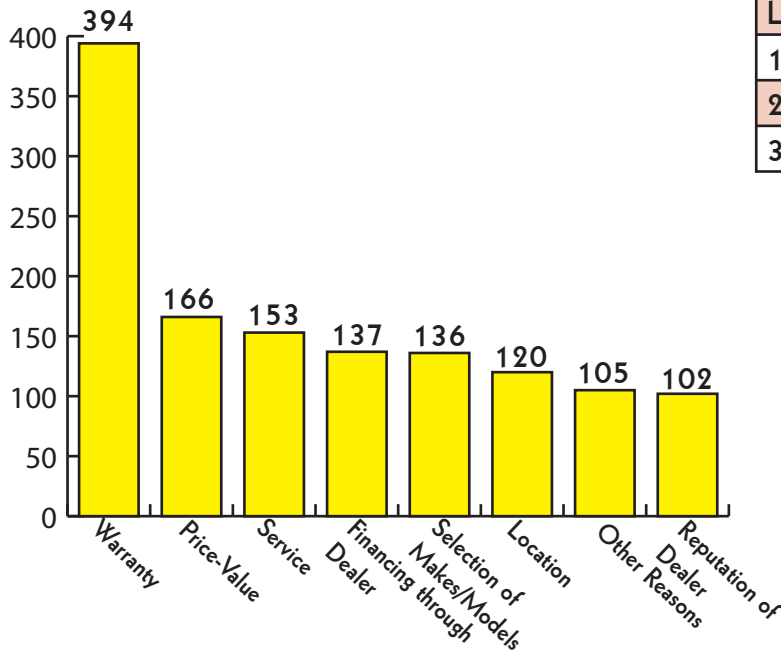
Nissan Owners Are 54% More Likely Than All Consumers to Have Purchased a Vehicle Online in the Past 12 Months (Index)



Nissan Owners are defined as consumers who own or lease a Nissan vehicle in their household.
Source: Scarborough Research USA+, Release 1 2006

Hyundai Owners Profile

Reasons Why Hyundai Owners Selected a Dealership for Their Last New Vehicle Purchase/Lease (Index, 100=National Average)



Miles Traveled One-Way to Buy/Lease Last New Vehicle Among Hyundai Owners

Less than 10 Miles	31%
10-19 Miles	20%
20-29 Miles	14%
30 or Miles or More	13%

Hyundai Owners
Median Age: 43
Median Annual Household Income: \$59,963

Percentage of Annual Hyundai Sales by Month: A Three Year Trend

Automotive News Data Center 2004-2006

Year	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	Total
2004	5.7%	6.8%	8.6%	8.4%	9.6%	9.9%	9.6%	9.2%	8.4%	7.9%	7.1%	8.9%	418,615
2005	5.7%	7.5%	8.8%	9.0%	8.9%	9.5%	9.8%	9.3%	8.4%	6.5%	7.3%	9.4%	455,012
2006	6.6%	7.5%	9.2%	9.0%	9.3%	9.8%	10.4%	9.8%	7.3%	6.7%	6.2%	8.2%	455,520

Demographics

	Total U.S. Adults	Hyundai Owners	Index
Men	50%	46%	96
Women	50%	54%	104
Married	57%	61%	107
Widowed/Legally Separated/Divorced	18%	15%	86
Never Married (Single)	25%	24%	95

54% of Hyundai owners are women.

Hyundai Owners are defined as consumers who own or lease a Hyundai vehicle in their household
Source: Scarborough Research USA+
Release 1 2006

Hyundai Owners Profile

Top 10 Formats for Hyundai Owners

All formats represent opportunity for Hyundai to expand its market share.

Radio Format Profiles	Total U.S Adults	Hyundai Owners	Index
Country	21%	21%	101
News/Talk/Information	20%	20%	99
Adult Contemporary	15%	18%	117
Pop CHR	13%	16%	124
Rhythmic CHR	9%	12%	138
Classic Rock	11%	12%	105
Hot AC	9%	10%	117
Oldies	8%	10%	116
Alternative	6%	8%	125
Album Oriented Rock	5%	7%	155

Vehicles Purchased/Leased by Household

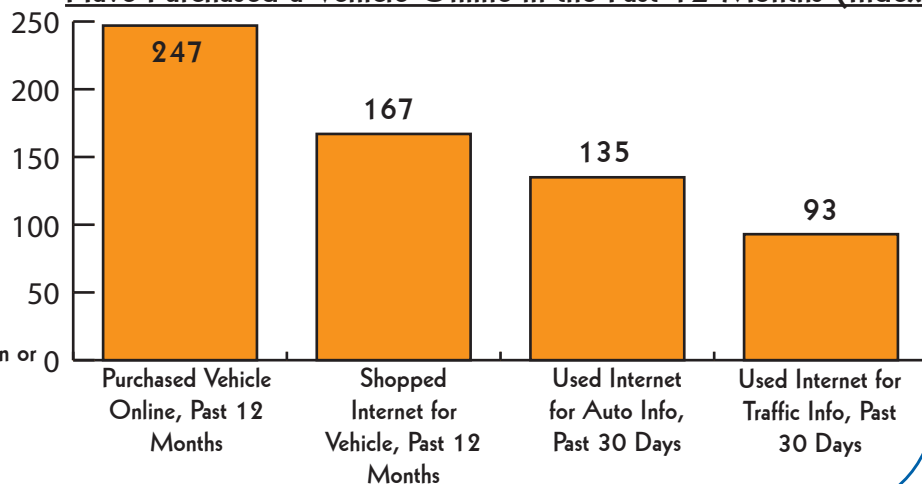
Type of Vehicle	Total U.S. Adults	Hyundai Owners	Index
Any New Vehicle	53%	76%	144
Any Used Vehicle	64%	61%	96
Any Leased Vehicle	5%	5%	98

Country is the number one radio format for Hyundai owners, with 21% tuning in.

33% of Hyundai Owners cite themselves as the principal decision maker for the last new vehicle purchase/lease; 27% say the decision was "shared equally" in their household.

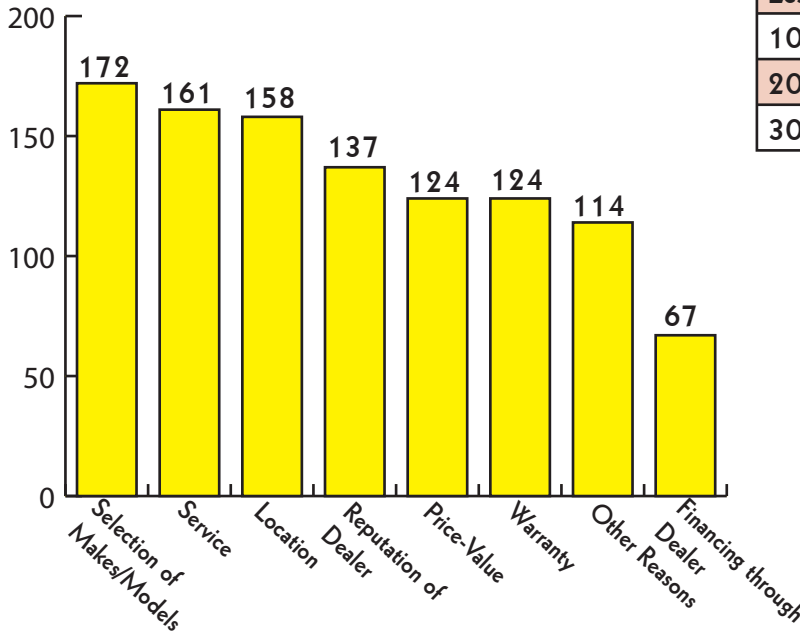
Hyundai Owners are defined as consumers who own or lease a Hyundai vehicle in their household.
Source: Scarborough Research USA+, Release 1 2006

Hyundai Owners Are 147% More Likely Than All Consumers to Have Purchased a Vehicle Online in the Past 12 Months (Index)



Lexus Owners Profile

Reasons Why Lexus Owners Selected a Dealership for Their Last New Vehicle Purchase/Lease (Index, 100=National Average)



Miles Traveled One-Way to Buy/Lease Last New Vehicle Among Lexus Owners

Less than 10 Miles	26%
10-19 Miles	21%
20-29 Miles	12%
30 or Miles or More	17%

Lexus Owners
 Median Age: 50
 Median Annual Household Income: \$95,065

Percentage of Annual Lexus Sales by Month: A Three Year Trend

Automotive News Data Center 2004-2006

Year	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	Total
2004	6.9%	7.1%	8.7%	8.2%	9.1%	8.0%	8.7%	8.8%	7.0%	8.2%	7.9%	11.3%	287,927
2005	6.0%	6.5%	8.4%	8.6%	8.7%	8.6%	8.8%	9.3%	7.3%	7.7%	8.5%	11.6%	302,895
2006	6.1%	6.6%	8.6%	7.7%	9.3%	8.6%	8.4%	9.6%	8.0%	7.4%	8.3%	11.5%	322,434

Demographics

	Total U.S. Adults	Lexus Owners	Index
Men	50%	53%	110
Women	50%	47%	91
Married	57%	70%	123
Widowed/Legally Separated/Divorced	18%	12%	65
Never Married (Single)	25%	18%	73

53% of Lexus owners are men and 70% are married.

Lexus Owners are defined as consumers who own or lease a Lexus vehicle in their household
 Source: Scarborough Research USA+
 Release 1 2006

Lexus Owners Profile

Top 10 Formats for Lexus Owners

All formats represent opportunity for Lexus to expand its market share.

Radio Format Profiles	Total U.S Adults	Lexus Owners	Index
News/Talk/Information	20%	30%	150
Adult Contemporary	15%	19%	126
Country	21%	14%	70
Pop CHR	13%	12%	86
All News	5%	11%	219
Classic Rock	11%	11%	95
All Sports	6%	10%	167
Hot AC	9%	9%	103
Oldies	8%	9%	105
Rhythmic CHR	9%	9%	99

Vehicles Purchased/Leased by Household

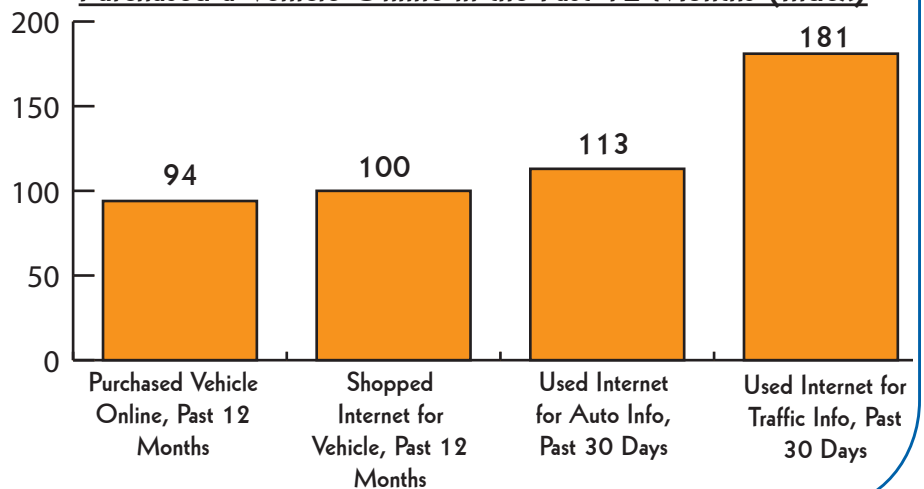
Type of Vehicle	Total U.S. Adults	Lexus Owners	Index
Any New Vehicle	53%	69%	131
Any Used Vehicle	64%	57%	90
Any Leased Vehicle	5%	15%	292

News/Talk/Information is the number one radio format for Lexus owners, with 30% tuning in.

33% of Lexus Owners cite themselves as the principal decision maker for the last new vehicle purchase/lease; 29% say the decision was "shared equally" in their household.

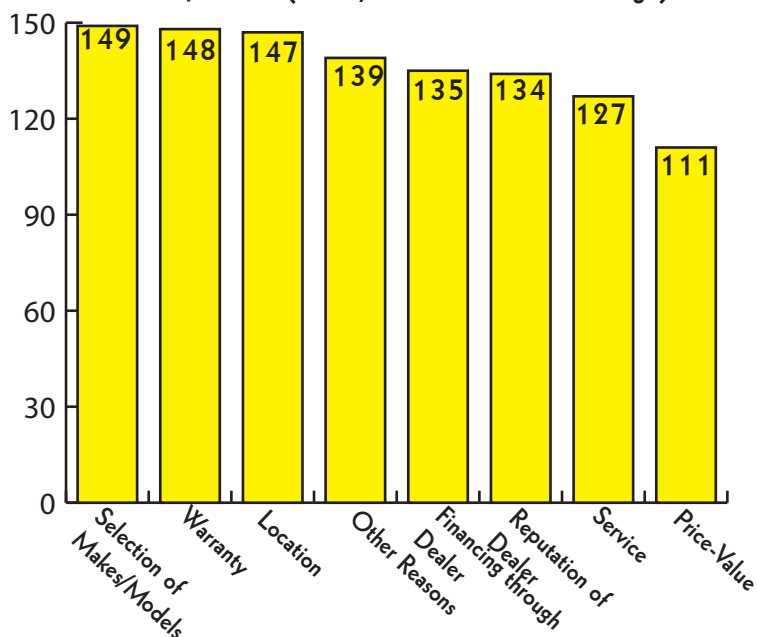
Lexus Owners are defined as consumers who own or lease a Lexus vehicle in their household.
 Source: Scarborough Research USA+, Release 1 2006

Lexus Owners Are 6% Less Likely Than All Consumers to Have Purchased a Vehicle Online in the Past 12 Months (Index)



BMW Owners Spotlight

Reasons Why BMW Owners Selected a Dealership for Their Last New Vehicle Purchase/Lease (Index, 100=National Average)



Miles Traveled One-Way to Buy/Lease Last New Vehicle Among BMW Owners

Less than 10 Miles	27%
10-19 Miles	21%
20-29 Miles	11%
30 or Miles or More	15%

BMW Owners
 Median Age: 43
 Median Annual Household Income: \$98,847

Percentage of Annual BMW Sales by Month: A Three Year Trend

Automotive News Data Center 2004-2006

Year	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	Total
2004	5.1%	6.5%	8.7%	9.0%	9.4%	9.6%	8.3%	8.5%	8.4%	8.7%	8.0%	9.8%	260,079
2005	6.3%	6.9%	7.6%	7.9%	8.7%	8.8%	8.7%	9.6%	8.3%	8.4%	8.9%	9.9%	266,200
2006	7.0%	7.0%	8.9%	9.2%	9.0%	8.8%	7.3%	8.2%	7.4%	7.6%	8.2%	11.3%	274,432

Demographics

	Total U.S. Adults	BMW Owners	Index
Men	50%	53%	109
Women	50%	47%	92
Married	57%	64%	112
Widowed/Legally Separated/Divorced	18%	10%	54
Never Married (Single)	25%	27%	106

64% of all BMW owners are married.

BMW Owners are defined as consumers who own or lease a BMW vehicle in their household
 Source: Scarborough Research USA+
 Release 1 2006

BMW Owners Spotlight

Top 10 Formats for BMW Owners

All formats represent opportunity for BMW to expand its market share.

Radio Format Profiles	Total U.S Adults	BMW Owners	Index
News/Talk/Information	20%	27%	136
Adult Contemporary	15%	19%	126
Pop CHR	13%	17%	128
Country	21%	14%	67
Hot AC	9%	13%	144
Classic Rock	11%	12%	109
Alternative	6%	12%	182
Rhythmic CHR	9%	11%	120
All Sports	6%	10%	170
All News	5%	10%	185

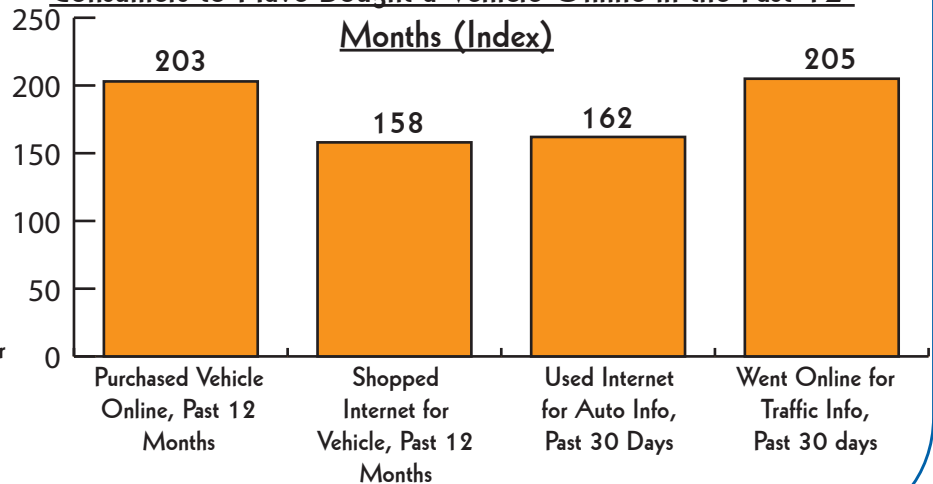
Vehicles Purchased/Leased by Household

Type of Vehicle	Total U.S. Adults	BMW Owners	Index
Any New Vehicle	53%	67%	128
Any Used Vehicle	64%	67%	104
Any Leased Vehicle	5%	15%	288

News/Talk/Information is the number one radio format for BMW owners, with 27% tuning in.

33% of BMW Owners cite themselves as the principal decision maker for the last new vehicle purchase/lease; 24% say the decision was "shared equally" in their household.

BMW Owners Are More Than Twice As Likely As All Consumers to Have Bought a Vehicle Online in the Past 12 Months (Index)



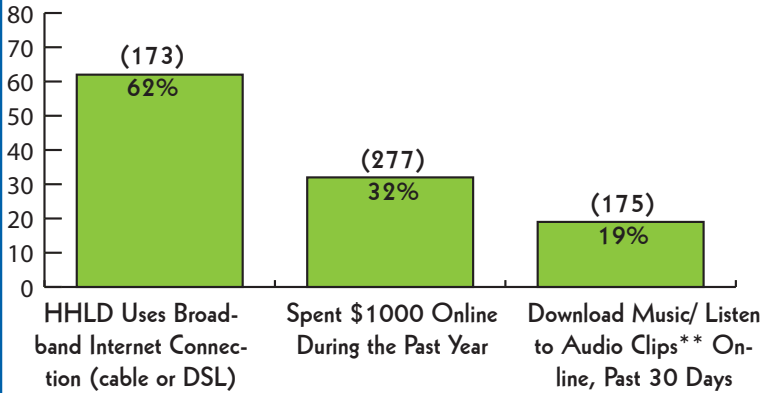
BMW Owners are defined as consumers who own or lease a BMW vehicle in their household.

Source: Scarborough Research USA+, Release 1 2006

BMW Owners

New Technology and Media Spotlight

BMW Owners as Internet Users At-A-Glance
(Percent Penetration and Index)



BMW Owners are 127% More Likely than the Average Consumer to have an MP3 Player (such as an iPod) in their HHLID.**

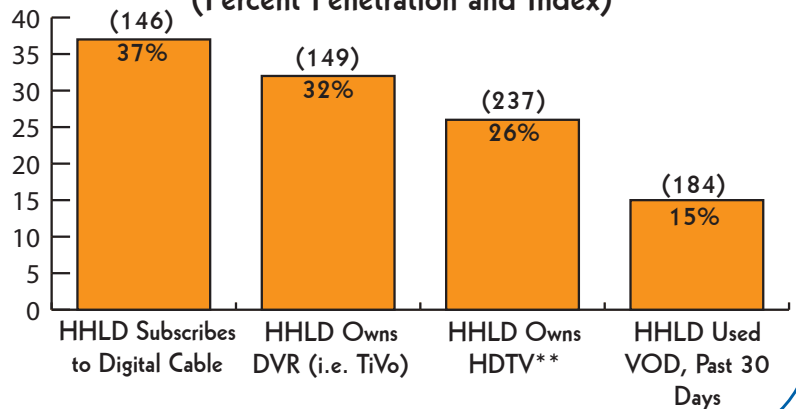
Potential New Luxury Vehicle Buyers*
Are 20% More Likely to be Among Radio's Most Avid Listeners

Quintile (Radio Avidity)	Potential New Luxury Vehicle Buyers	Index
Radio Quintile 1 (Most Avid Listeners)	19%	120
Radio Quintile 2	19%	119
Radio Quintile 3	18%	113
Radio Quintile 4	16%	105
Radio Quintile 5 (Least Avid Listeners)	13%	85

23% of BMW Owners have a PDA (Personal Digital Assistant). They are 157% more likely than the average consumer to have this type of personal technology in their HHLID.

BMW Owners are defined as consumers who own or lease a BMW vehicle in their household. Source: Scarborough Research USA+, Release 1 2006 12 Months (** Six Months). *Potential New Luxury Vehicle Buyers are consumers who plan to purchase or lease a new luxury vehicle during the next year.

BMW Owners Utilize New Entertainment Technologies
(Percent Penetration and Index)



SOURCE AND CONTACT INFORMATION

SOURCE: The data in this report is from Scarborough USA+ (Release 1 2006), a study of national consumer media patterns, lifestyles, demographics, and shopping behaviors. All data is based on the full 12-month release, unless otherwise noted. Automotive sales data is from the Automotive News Data Center, 2004-2006, and has been provided by the Radio Advertising Bureau. This report is brought to you as a special study from the Radio Advertising Bureau and Scarborough Research.

The Scarborough Research/RAB Automotive Study is available online at:

www.scarborough.com/freestudies.php
www.rab.com

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